Oracle Fusion Cloud Sales Automation

How do I get started with Partner Relationship Management (PRM) in the Redwood User Experience?

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2 Implementation Summary

Before You Start

You should have subscribed to the Oracle Sales Cloud Service and should have received the email with your environment URLs and initial sign-on information.

Since Partner Relationship Management (PRM) is a set of features within your Oracle Sales application, this playbook assumes that you've already implemented and configured your Sales application as specified in the playbook How do I get started with Oracle Sales in the Redwood User Experience?*How do I get started with Oracle Sales for Redwood?*

Case Study

In this playbook, a case study is used to define the scope of the implementation tasks and illustrate their interdependence.

The case study is based on a fictitious company named Vision Corp, a global technology provider offering cloud-based software solutions to businesses of all sizes. Vision Corp would like to implement Oracle Redwood Partner Relationship Management (PRM) to streamline their partner ecosystem.

Vision Corp partners with TechWave Solutions, a key business partner, to expand its reach and drive sales. To achieve this, Vision Corp aims to onboard TechWave Solutions and its partner users efficiently, ensuring the users can enroll in partner programs without delays. TechWave Solutions is able to register and manage deals seamlessly, allowing it to track sales opportunities and secure approvals without friction. Additionally, Vision Corp plans to use Market Development Funds (MDF) to support TechWave Solutions' marketing efforts by providing funds for campaigns and activities aligned with Vision Corp's business goals.

By implementing Oracle Redwood PRM, Vision Corp aims to create a cohesive, user-friendly platform that enhances collaboration with TechWave Solutions and drives mutual growth.

Implementation Overview

You can use this playbook to get started with the implementation of Partner Relationship Management (PRM) in the Redwood User Experience.

This playbook ensures you've all the necessary steps to enable, configure, and verify PRM capabilities for seamless partner collaboration and effective channel sales management.

At a high-level, here's what you need to do to get started with Partner Relationship Management in the Redwood User Experience:

1. Enable PRM in the Redwood User Experience
    - *Access Cloud Account Details*
    - *Enable Redwood PRM Features*

- *Add Privileges to Access PRM Redwood Features*

2. Partner Onboarding
   - *Create Partner*
   - *Create Partner Contacts and Assign User Roles*
3. Implement PRM in the Redwood User Experience
   - *Create Program Enrollments for Partner*
   - *Create and Manage Deals*
   - *Create and Utilize Market Development Funds (MDF)*
   - *Utilize Partner Collaboration Tools*
4. Verify PRM Implementation
   - *Verify as a Partner*
   - *Verify as a Channel Manager*

What You'll be Able to Do After Completing these Setup Steps

After you complete the setup steps described in this guide, your organization's stakeholders will be equipped to effectively manage the Partner Relationship Management (PRM) processes, enabling seamless collaboration with partners and driving channel sales.

Sales Administrator will be able to:

- Enable Redwood PRM elements.
- Assign initial privileges.

Channel Operations Manager (COM) will be able to:

- Approve or reject partner registration requests.
- Create MDF Budgets.
- Oversee MDF requests, ensuring appropriate fund allocation and utilization tracking.

Channel Account Manager (CAM) will be able to:

- Create MDF request on behalf of the partners.
- Approve the MDF request and MDF claims.
- Manage relationships with assigned partners, including direct communication and collaboration.
- Evaluate and approve deal registration requests, ensuring alignment with organizational goals.

Partner Users:

- Partner Administrator will be able to:
  - Create and manage user accounts within the partner organization.
  - Assign roles and permissions to partner sales teams.
  - Monitor partner activity and ensure compliance with program requirements.

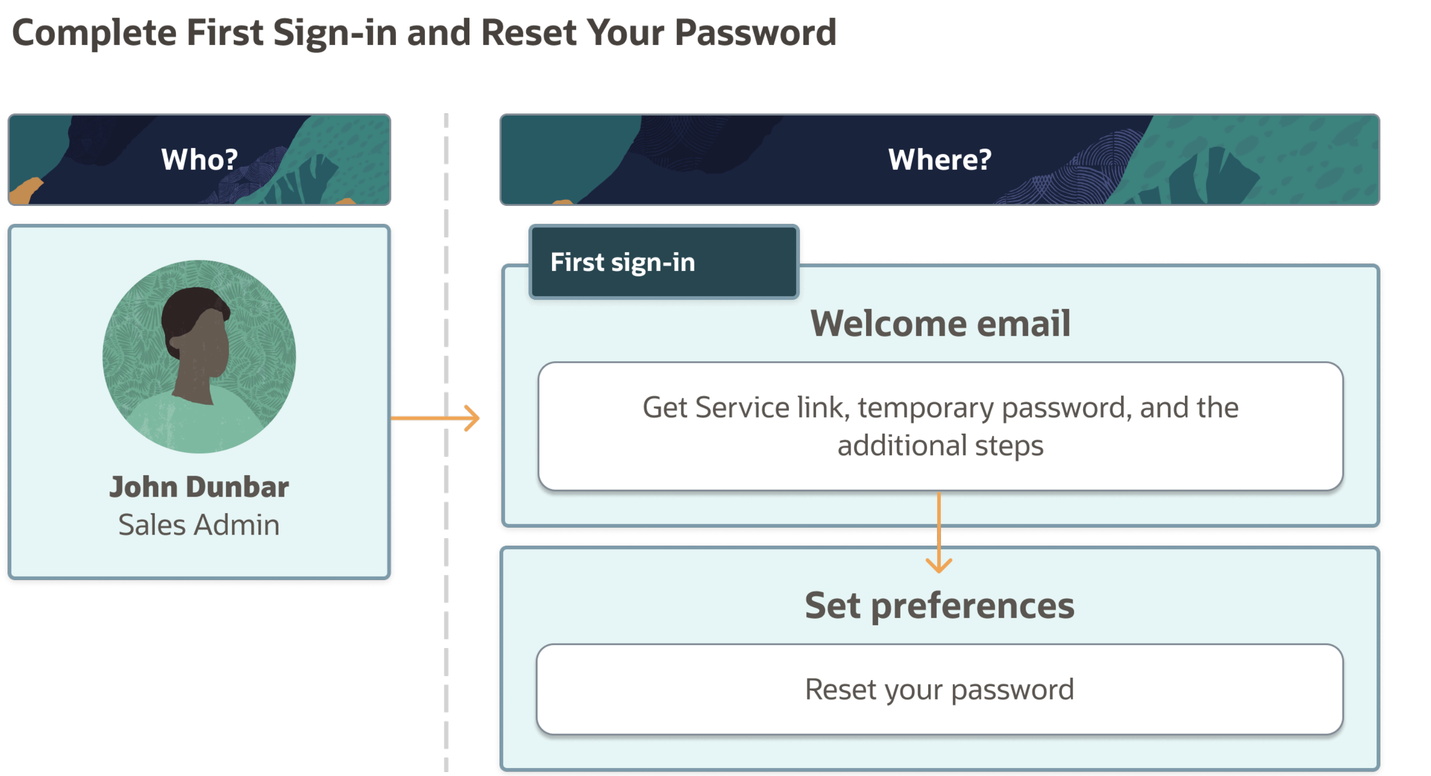
- Partner Sales Manager will be able to:
    - Oversee the sales team's activities and manage the pipeline of leads and opportunities.
    - Review and approve team submissions for deal registrations and lead conversions.
- Partner Sales Representative will be able to:
    - Submit deal registrations with all necessary details for channel manager approval.

3 Enable PRM in the Redwood UX

Access Cloud Account Details

Once your environment is ready, Oracle emails the designated administrator a welcome message with a service link, a temporary password, and steps to access the Service Administrator Action List.

On your first sign-in, reset your password by navigating to **Settings and Actions** > **Set Preferences**.



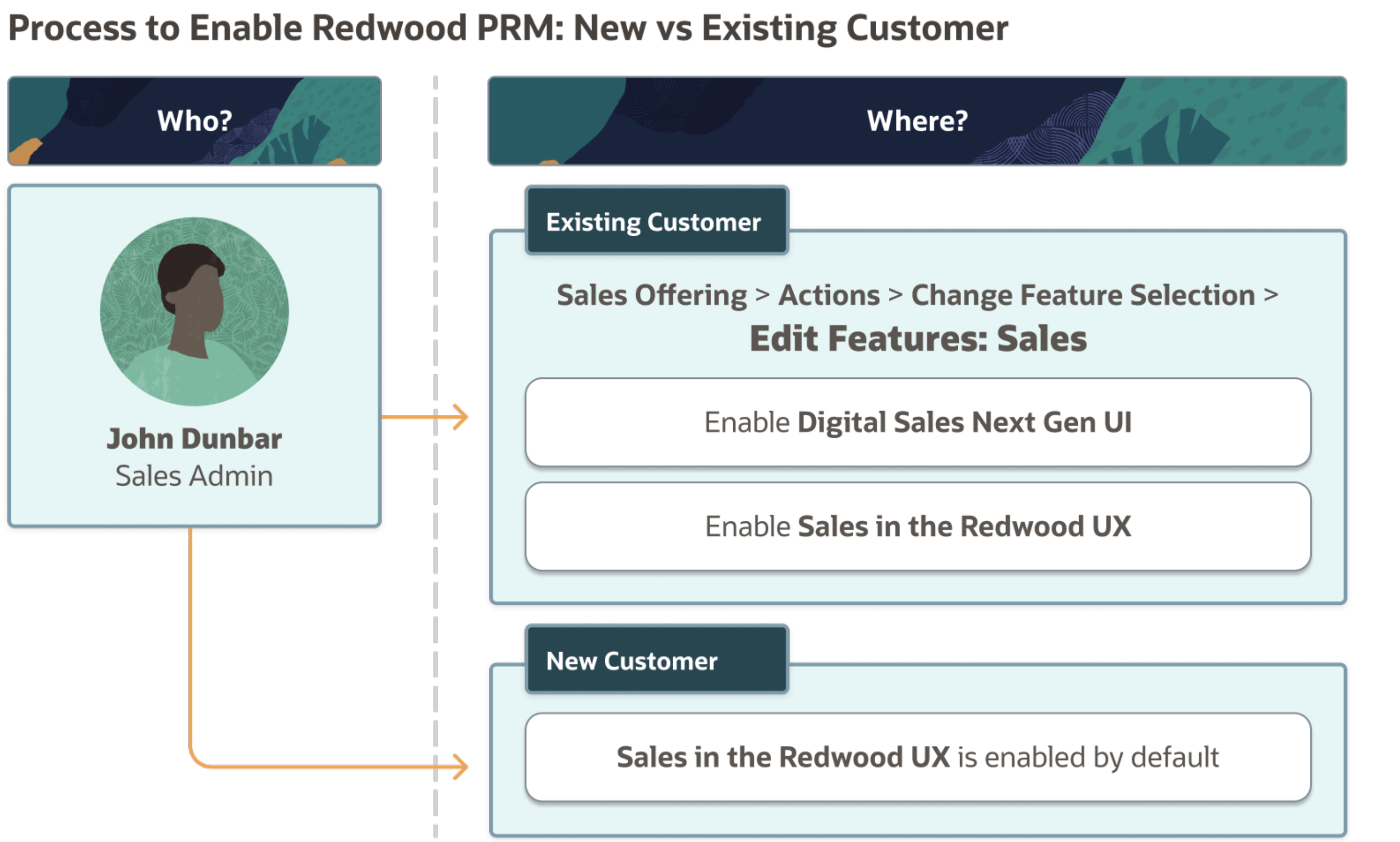
Enable Redwood PRM Features

To enable Redwood PRM features, you need to enable Sales in the Redwood UX.

If you're a new customer, **Sales in the Redwood UX** is already enabled for you. If you're an existing customer, make sure both **Digital Sales Next Gen UI** and **Sales in the Redwood UX** are enabled in the Sales offering.

As an existing customer, you can follow these steps:

1. Sign in as a sales administrator such as John Dunbar.
2. Go to **Setup and Maintenance** > **Sales** offering.
3. From the **Actions** menu, select **Change Feature Selection**.
4. On the **Edit Features: Sales** page, enable both **Digital Sales Next Gen UI** and its child feature, **Sales in the Redwood UX**.
5. Click **Done**.



For more information, refer: *Enable Sales in the Redwood UX*

Add Privileges to Access PRM Redwood Features

Users with the following job roles have access to both PRM in the Redwood UX and the classic PRM UIs:

- Sales Representative
- Sales Manager
- Sales VP

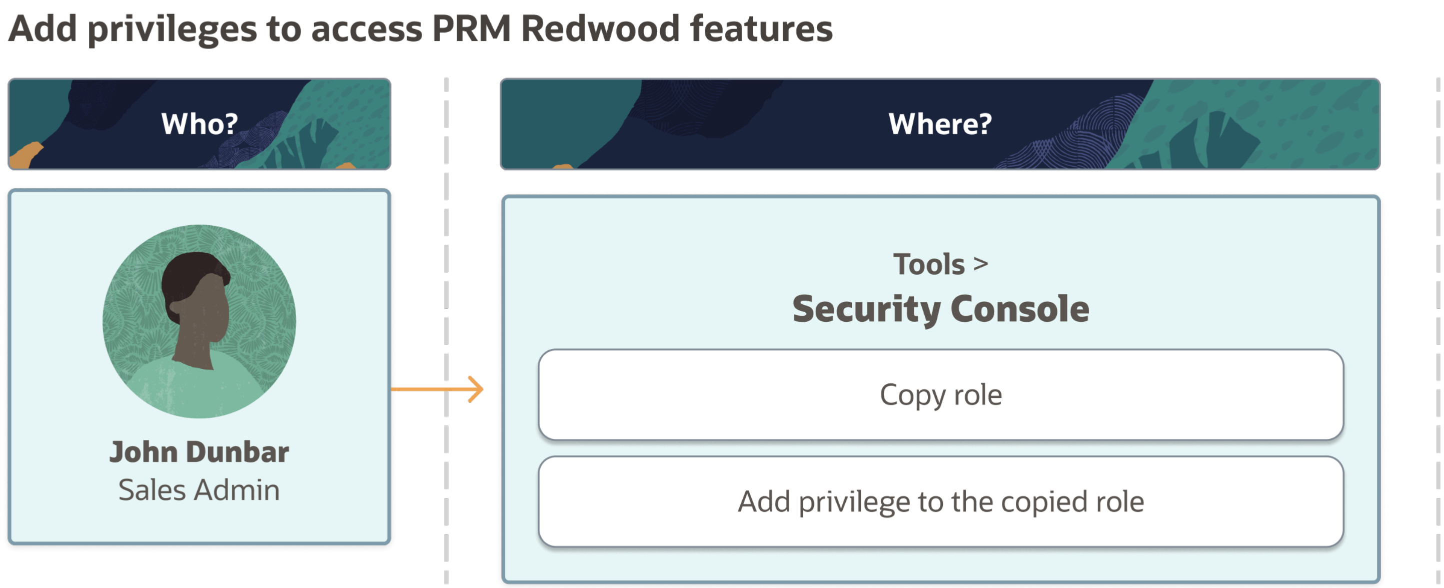
- Sales Administrator

You can assign these privileges to the users with other job roles, to view PRM features in the Redwood UX:

- ZCM_VIEW_DIGITAL_SALES_ACCOUNT_PRIV
- ZCM_VIEW_DIGITAL_SALES_CONTACT_PRIV
- MOO_VIEW_DIGITAL_SALES_OPPORTUNITY_PRIV
- MKL_VIEW_DIGITAL_SALES_SALES_LEAD_PRIV
- ZMM_VIEW_DIGITAL_SALES_ACTIVITY_PRIV
- ZBS_VIEW_SALES_DASHBOARD_PRIV
- ZPM_VIEW_PARTNER_PROFILE_PRIV

Here are the steps to add privileges for any selected role:

1. Sign in as a sales administrator such as John Dunbar.
2. Navigate to **Tools** > **Security Console**.
3. Copy the role you want to add privileges to:
    a. On the Roles tab of the Security Console, search for the role to copy.
    b. Select the role in the search results. The role hierarchy appears in tabular format by default.
    c. In the search results, click the down arrow for the selected role and select **Copy Role**.
    d. In the **Copy Options** dialog box, select a copy option.
    e. Click **Copy Role**.
4. Add a privilege to the copied role:
    a. Click **Add Function Security Policy**.
    b. In the **Add Function Security Policy** dialog box, search for and select the privilege.
    c. If you select a role, then click **Add Selected Privileges** to add all function security privileges from the role to your custom role. If you select a single privilege, then click **Add Privilege to Role**.
    d. Click **OK** to close the confirmation message.
    e. Repeat to add more privileges.
    f. Close the **Add Function Security Policy** dialog box.



Related Topics

- Concepts for Creating Sales Resources
- How do I edit job or abstract roles?

4 Partner Onboarding

Create Partner

In Oracle Redwood Partner Relationship Management (PRM), a partner represents an organization that collaborates with your company to sell products or services.

For Vision Corp, TechWave Solutions is a key partner that needs to be onboarded efficiently to start driving sales.

Here's how you can create a partner in the Redwood UX:

1. Sign in as a channel manager such as Bonnie Vickers.
2. Navigate to **Redwood Sales** > **Partners**.
3. On the Partners list page, click **Create Partner**.
4. Add the relevant details.

By setting up TechWave Solutions as a partner in Redwood PRM, Vision Corp ensures smooth collaboration, enabling TechWave to register deals, enroll in programs, and access MDF funds seamlessly.

Create Partner Contacts and Assign User Roles

Partner contacts are individuals within the partner organization who manage sales, marketing, or operations.

For TechWave Solutions, these contacts will be responsible for deal registrations, marketing efforts, and partner collaboration.

Here are the steps for creating Partner Contacts:

1. Sign in as a channel manager such as Bonnie Vickers.
2. Navigate to **Redwood Sales** > **Partner Contacts**.
3. On the Partner Contacts lists page, click **Create Partner Contact**.

Structuring partners and contacts efficiently streamlines communication, assigns responsibilities, and tracks interactions effectively.

Assign User Roles

After creating the partner contact, you can assign them a user role to access Sales by following these steps:

1. Navigate to All Partner Contacts lists page.
2. Search and select the partner contact you want to assign user role.
3. On the partner contact's page, smart search for Create User Account.
4. In the **Create User Account** drawer, select the appropriate role from the drop-down list.
5. Add a user name, and select the appropriate manager.

You can create a password for the partner contact user to sign in by following these steps:

1. Navigate to **Security Console** > **Users**.

2. Search for the partner contact using the user name.
3. From the Action drop-down list select Reset Password.

5 Implement PRM in the Redwood UX

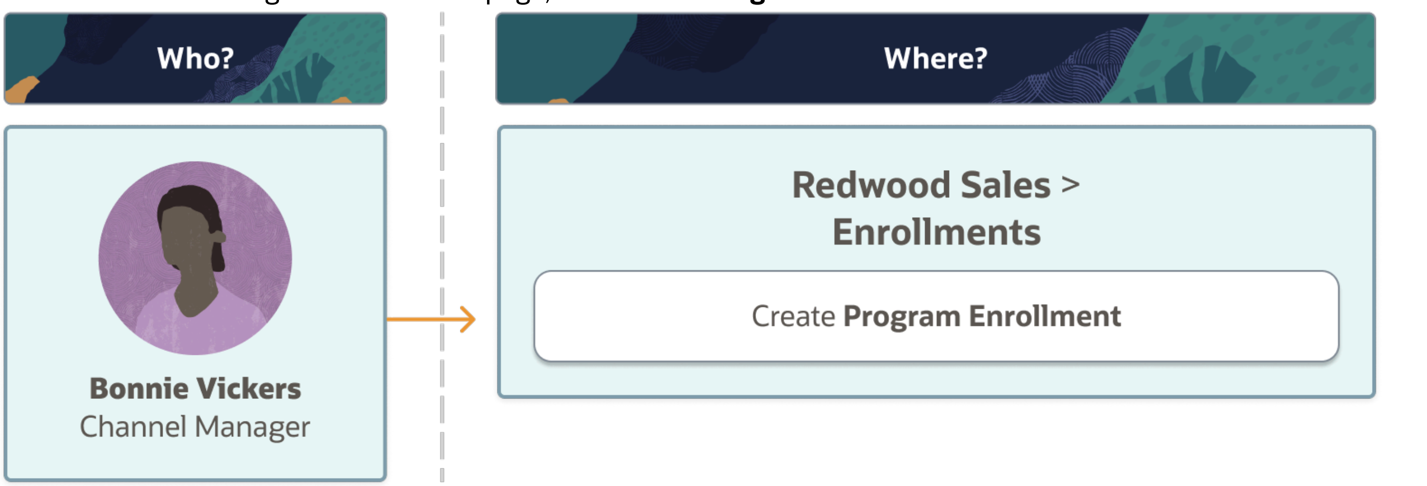
Create Program Enrollments for Partner

Partner Program Enrollment enables you to manage program memberships and administer benefits.

For Vision Corp, properly managing TechWave Solutions' enrollments ensures they can access the benefits, helping them sell more effectively and stay motivated to engage in Vision Corp's sales ecosystem.

You can follow these steps to enroll a partner in a partner program:

1. Sign in as the channel manager such as Bonnie Vickers.
2. Navigate to **Redwood Sales** > **Enrollments**.
3. On the All Program Enrollments page, click **Create Program Enrollment**.



Create and Manage Deals

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 registration lets partners submit sales opportunities for approval, ensuring deal ownership and avoiding conflicts. In Redwood Partner Relationship Management (PRM), partners can easily register deals, track approvals, and convert them into opportunities.

Here are some key benefits:

- Guided submission for easy deal entry.
- Automated duplicate checks to prevent redundancy.
- Configurable approvals for seamless validation.
- Real-time tracking for transparency.

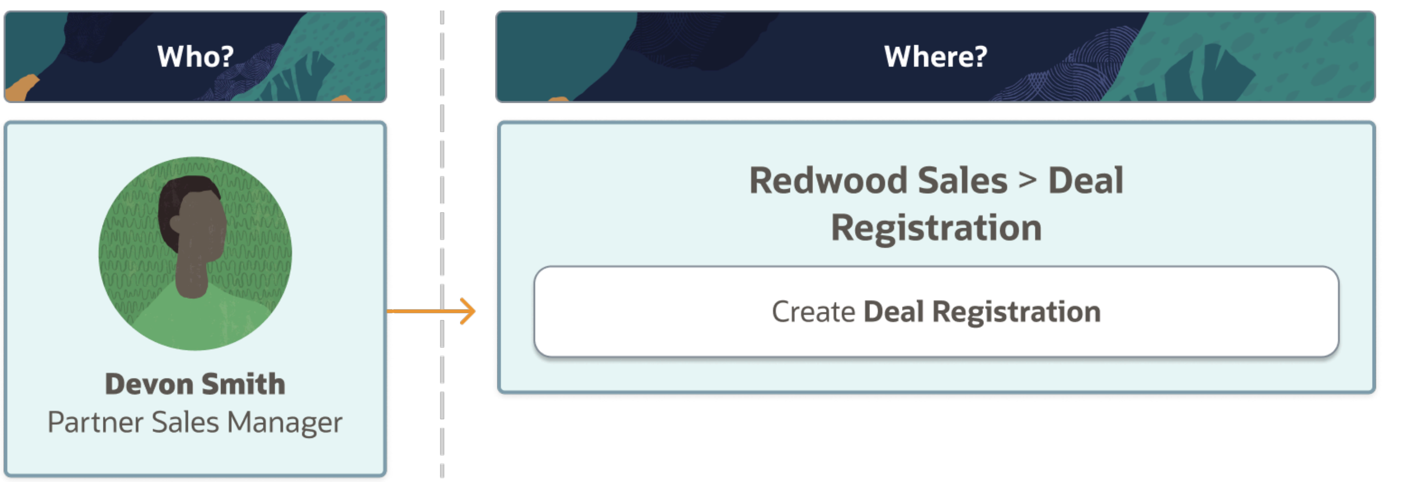
As a partner, you can create deal registration by following these steps:

1. Navigate to **Redwood Sales** > **Deal Registration**.
2. On the All Deal Registrations page, click **Create Deal Registration**.

Note: If you need to reuse details from an existing deal, you can copy a deal registration and create a new draft instead of starting from scratch. To do this, open the deal registration, select **Copy Deal Registration** from the **Actions** bar, and confirm the action. A new draft deal is created with a system-generated number and all the copied details.

As a partner or channel manager, you can manage and track deals using All Deal Registrations page.

With Oracle Redwood Partner Relationship Management (PRM), Vision Corp and TechWave Solutions streamline deal management, improving collaboration and sales efficiency.



Create and Utilize Market Development Funds (MDF)

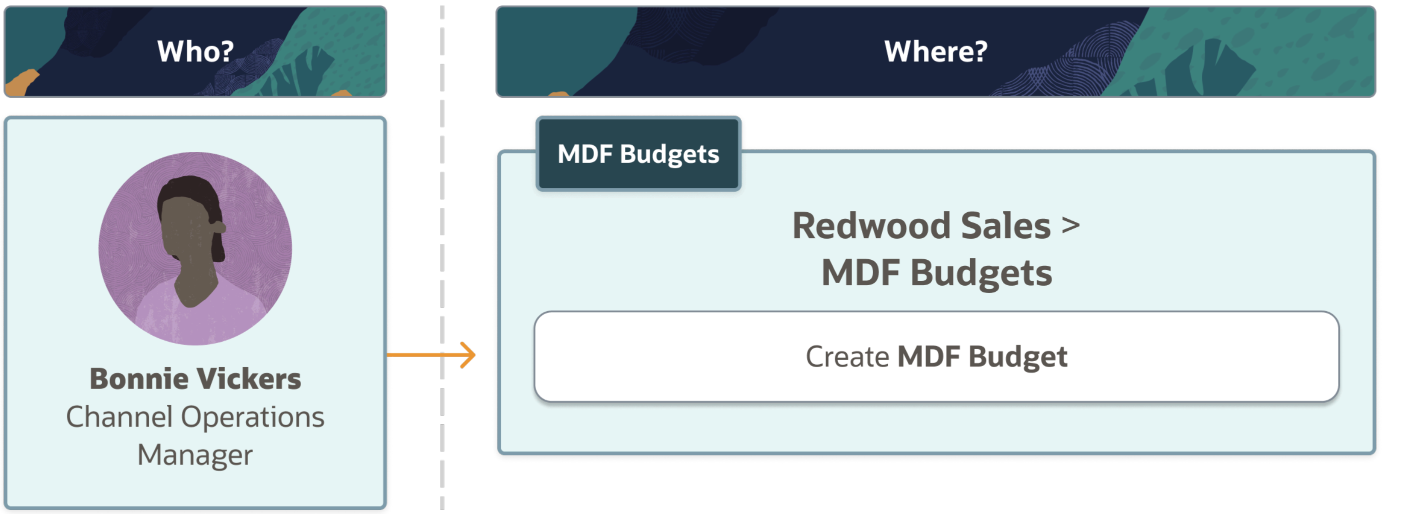
MDF enables partners to request funding for marketing activities that generate demand and drive sales. It involves a structured process for fund allocation, request submission, and claim approval.

Proper MDF tracking ensures fair fund distribution, compliance, and measurable ROI on marketing investments.

MDF Budgets

MDF Budgets define how much funding is available for partner marketing initiatives. Here are the steps to create an MDF Budget:

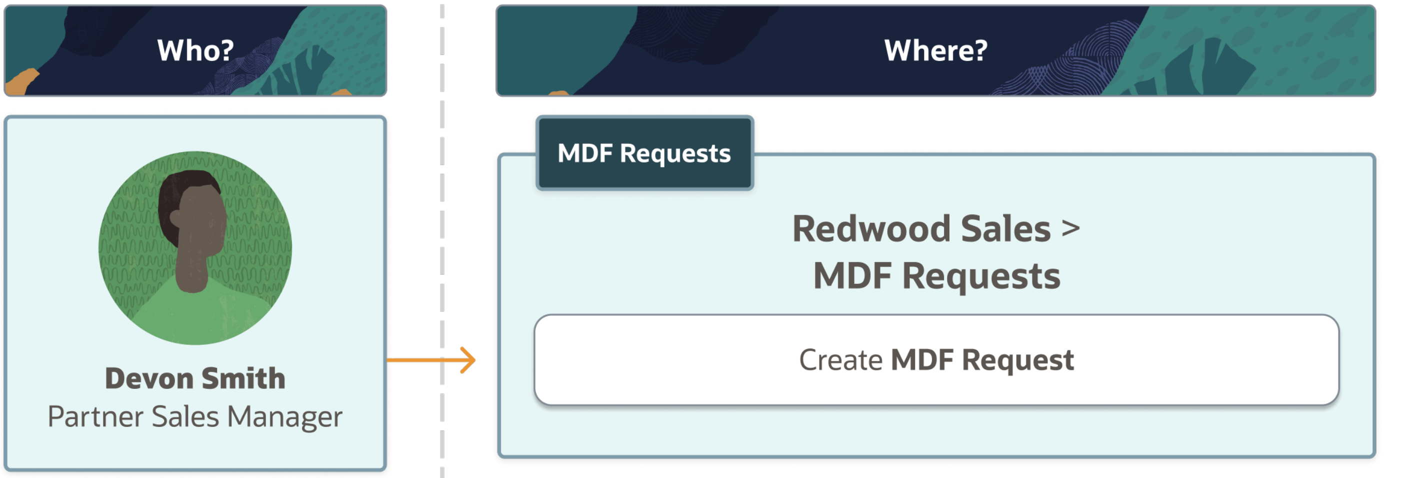
1. Sign in as a channel operations manager such as Bonnie Vickers.
2. Navigate to **Redwood Sales** > **MDF Budgets**.
3. On the Budgets list page, click **Create MDF Budget**.



MDF Requests

Partners submit MDF Requests to secure funding for marketing activities such as events, digital campaigns, or advertisements. You can follow these steps to create an MDF Request:

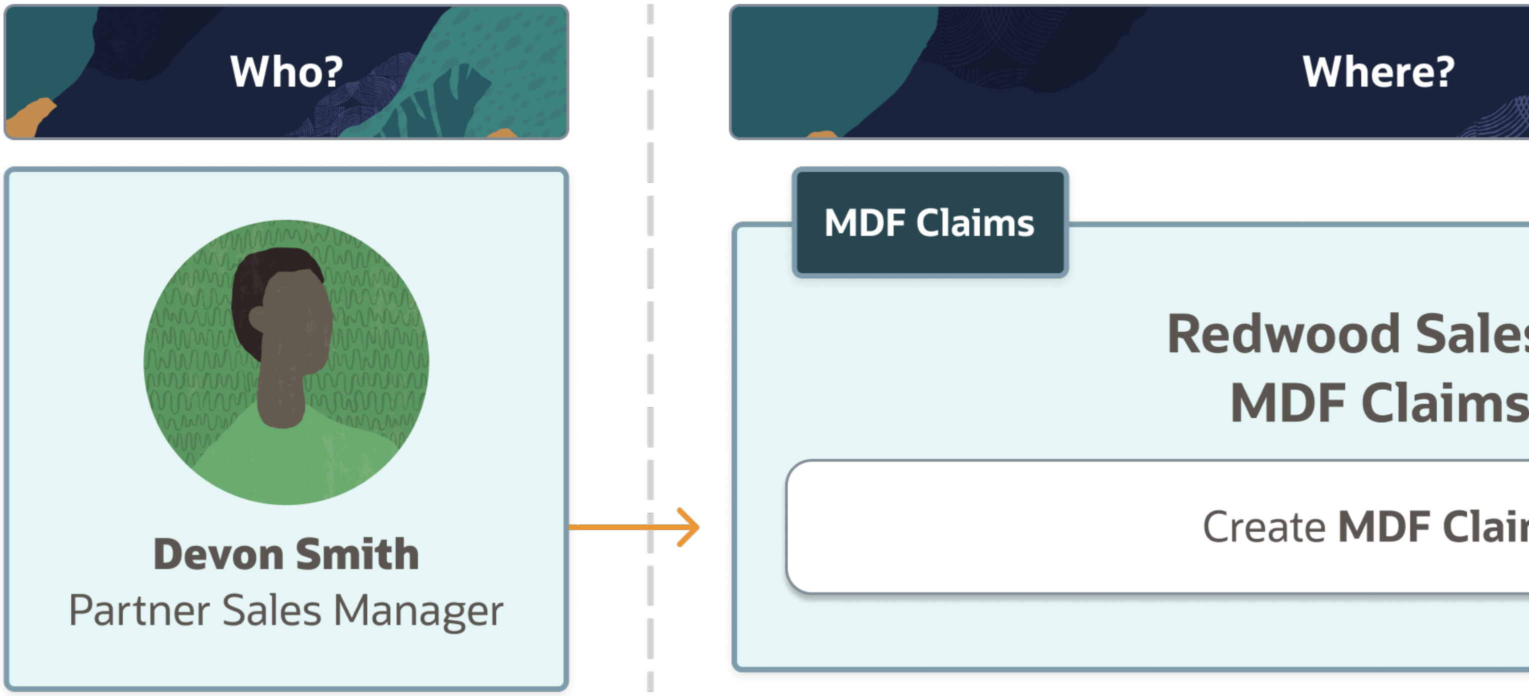
1. Sign in as a partner sales manager such as Devon Smith.
2. Navigate to **Redwood Sales** > **MDF Requests**.
3. On the Requests list page, click **Create MDF Request**.



MDF Claims

After executing a marketing activity, partners submit MDF Claims to get reimbursed for expenses.

1. Sign in as a partner sales manager such as Devon Smith.
2. Navigate to **Redwood Sales** > **MDF Claims**.
3. On the Claims list page, click **Create MDF Claim**.



For Vision Corp and TechWave Solutions, MDF is vital in supporting joint marketing efforts. By effectively managing MDF Budgets, Requests, and Claims through Oracle Redwood PRM, Vision Corp ensures that TechWave Solutions can run campaigns that generate demand, strengthen the partnership, and maximize sales outcomes.

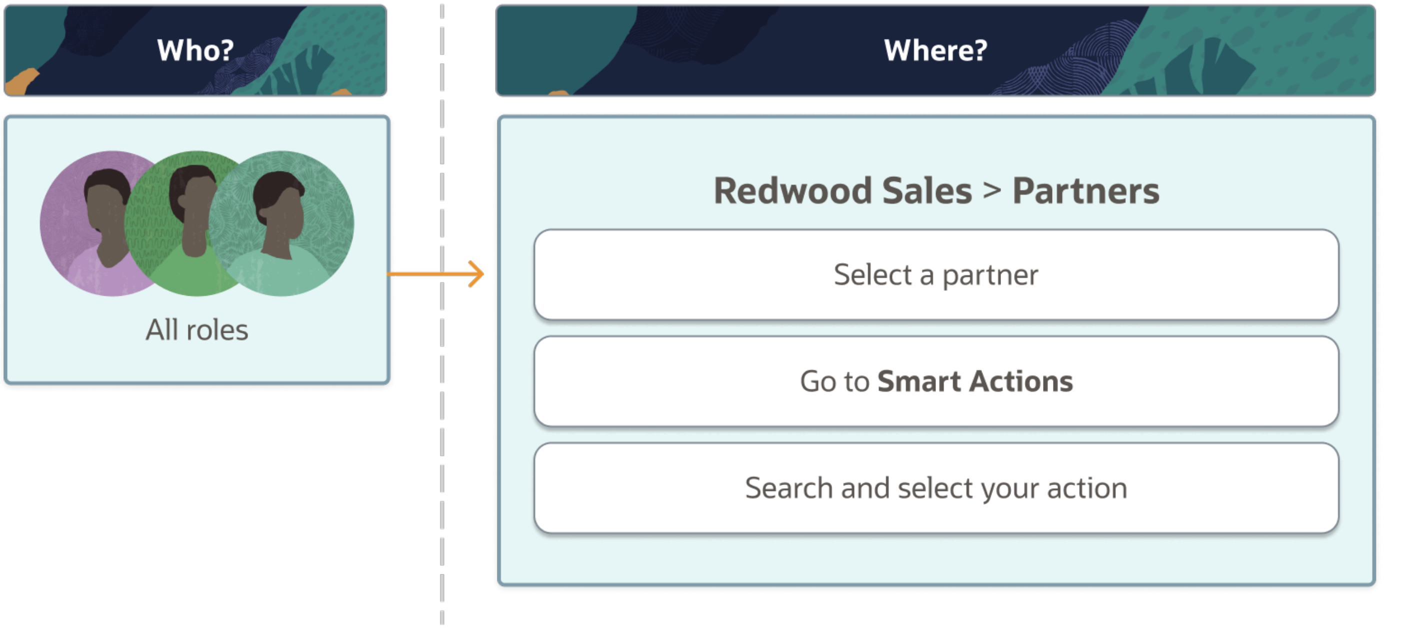
Utilize Partner Collaboration Tools

Oracle Redwood PRM's partner collaboration tool, Interaction Support, supports seamless two-way communication between any company, such as Vision Corp and its partners, ensuring every interaction is logged and easily trackable.

Interaction Support helps maintain transparency and improves collaboration between channel managers and partners. With Interaction Support, you can exchange messages within the system, eliminating the need for scattered email threads or external communication tools. Every conversation is recorded under the respective partner profile, making retrieving past interactions easy. You can follow these steps to use Interaction Support features:

1. Navigate to **Redwood Sales** > **Partners**.
2. On the Partners list page, select the appropriate partner.
3. On the partner's page, go to Smart Actions.
4. You can search and select:
    a. **Send Email** to send an email.
    b. **Log an Email** to log any emails that are sent using the internal or external application.
    c. **Log a Call** to log an inbound or outbound phone call.
    d. **Start Web Conference** to start a web conference.
    e. **Log an Interaction** to log a web conference, web interaction or any other medium of interaction.
5. Also, Interaction Support provides quick access to communication history. In Smart Actions, by searching for **Show Interactions**, you can instantly view previous discussions, ensuring partner engagement and decision-making continuity.

Use Interaction Support Features to Collaborate



6 Verify PRM Implementation

Verify as a Partner

As a Partner Sales Manager like Devon Smith from TechWave Solutions, you need to confirm that Vision Corp's Partner Relationship Management (PRM) system enables you to seamlessly manage your sales processes.

You can carry out the following actions to verify your setup:

- Create a deal registration. See *Create and Manage Deals* .
- Submit an MDF request. See *MDF Requests*.
- Submit an MDF claim. See *MDF Claims*.

Verify as a Channel Manager

As a channel operations manager such as Bonnie Vickers, you must confirm that Vision Corp's Partner Relationship Management (PRM) system can help you manage partner registrations, approve deals, and track MDF requests effectively.

Ensuring these functions work as intended will help streamline partner interactions and drive sales growth.

Partners and Partner Contacts

You can ensure that partners and partner contacts are correctly set up, enabling smooth collaboration between Vision Corp and TechWave Solutions.

Here's how you can verify and track a Partner's activities:

1. Navigate to **Redwood Sales** > **Partners**.
2. On the Partners list page, select the partner that you've created.

   You can now see the information associated with the selected partner, such as Partner Contacts, Leads, Opportunities, Deal Registrations, Hierarchy, Team, and Program Enrollments
3. You can verify the partner's details and also update them by clicking **Details**.

After creating a partner contact, you can add it as a Partner Contact for the appropriate partner. You can also track the Partner Contact's activities by following these steps:

1. Navigate to **Redwood Sales** > **Partner Contacts**.
2. On the Partner Contacts list page, select the partner that you've created.

   You can now see the information associated with the selected partner contact, such as Leads, Opportunities, and Deal Registrations,
3. You can verify the partner contact's details and also update them by clicking **Details**.

Partner Program Enrollments

Channel operations managers can manage partner program enrollments for their partners by approving partner enrollment requests, enrolling partners in programs, and renewing partner enrollments.

Marketing Development Funds (MDF) Budgets

You can ensure that Marketing Development Funds (MDF) Budgets are allocated and managed correctly for partners like TechWave Solutions. Here are the steps to verify:

1. Navigate to **Redwood Sales** > **MDF Budgets**.
2. On the Budgets list page, select the budget that you've created.
3. You can now track the activities associated with it and also update its details by clicking **Details**.

When a partner submits an MDF Request, you must assign it to the appropriate MDF budget before approval. Here are the steps:

1. Navigate to **Redwood Sales** > **MDF Requests**.
2. Select the MDF Request assigned to you.
3. On the MDF Request page, search for **Update Budget**.
4. Create or assign the appropriate MDF budget in the **Edit MDF Request** drawer.