ORACLE CRM On Demand

Oracle CRM On Demand for Partner Relationship Management Configuration Guide

Release 20

June 2012

Contents

1 What’s New in This Release

What’s New in Oracle CRM On Demand for Partner Relationship Management Configuration Guide, Release 20

No new features have been added to this guide for this release.

2 Overview of Oracle CRM On Demand for Partner Relationship Management

This chapter provides an overview of Oracle CRM On Demand for Partner Relationship Management. It includes the following topics:

About This Guide

This guide describes how to configure Oracle CRM On Demand for Partner Relationship Management and provides details of suggested page layouts and roles that you can set up to support partner relationship management. Your company's requirements might differ from the settings suggested in this guide.

This guide also provides examples of tasks and processes that are typically performed by users in Oracle CRM On Demand for Partner Relationship Management. Your company can customize the tasks and processes to support your business requirements. For more information about administering and using Oracle CRM On Demand, see *Oracle CRM On Demand Online Help*

About Partner Relationship Management

A *partner*, *partner channel* or *partner organization* is an external company or a person at a company that sells or services products belonging to the brand owner. Oracle CRM On Demand for Partner Relationship Management supports brand owners in managing their partner relationships. It improves the brand owners' ability to manage partners, partner programs, leads, deal registrations, opportunities, funds, fund requests, training, and certification.

Using Oracle CRM On Demand for Partner Relationship Management, you can manage the following:

- Partner accounts and profiling
- Partner programs
- Leads
- Service requests
- Business plans
- Objectives
- Opportunities
- Deal registrations
- Content (solutions)
- Market development fund requests

- Special pricing authorizations and requests
- Partner self-administration
- Training and certification

3 Getting Started

This chapter describes the initial tasks that must be completed before you begin to configure Oracle CRM On Demand for Partner Relationship Management. It includes the following topic:

- Provisioning Oracle CRM On Demand for Partner Relationship Management

Provisioning Oracle CRM On Demand for Partner Relationship Management

If your company plans to use Oracle CRM On Demand for Partner Relationship Management, your first task is to contact Customer Care and ask them to set up your company to use Oracle CRM On Demand for Partner Relationship Management. The initial setup process, which is referred to as *provisioning*, makes available Web pages, record types, features, and fields, which can differ from the standard edition of Oracle CRM On Demand for Partner Relationship Management but are relevant to your business.

Record Types for Oracle CRM On Demand for Partner Relationship Management

When Customer Care provisions Oracle CRM On Demand for Partner Relationship Management for your company, they add the following record types to Oracle CRM On Demand:

- Accreditation
- Certification
- Course
- Deal Registration
- Deal Registration Product Revenue
- Exam
- Partner
- Partner Program
- Fund
- Fund Request
- MDF Request
- Special Pricing Request
- Special Pricing Product

- Price List
- Price List Line Item

Customer Care also creates the PRM administrator access profiles and the PRM administrator role, and assigns this role to your company administrator. This role gives company administrators the privileges and access options that they require to do the following:

- Configure Oracle CRM On Demand for Partner Relationship Management.
- Create other roles.
- Grant the same privileges and access options to other roles, as required.

For more information on these configuration tasks, see Configuring Oracle CRM On Demand for Partner Relationship Management on page 13

Customer Care can also set up other features in Oracle CRM On Demand for Partner Relationship Management, including the following:

- Custom objects and company branding
- How your company accesses Oracle CRM On Demand
- How your company manages large volumes of data

4 Configuring Oracle CRM On Demand for Partner Relationship Management

This chapter describes how to configure Oracle CRM On Demand for Partner Relationship Management. It includes the following topics:

About Configuring Oracle CRM On Demand for Partner Relationship Management

This chapter provides suggested configurations for two roles in Oracle CRM On Demand for Partner Relationship Management, including page layouts and access profiles for those roles. It also describes the following:

- How to configure books and workflow rules for Oracle CRM On Demand for Partner Relationship Management
- How to add and manage users (that is, partner users) for Oracle CRM On Demand for Partner Relationship Management

  Your company requirements might differ from the settings suggested in this chapter.

Configuring Oracle CRM On Demand for Partner Relationship Management for your company involves setting up user roles, users, books, and workflow rules.

The PRM administrator can set up as many Oracle CRM On Demand for Partner Relationship Management specific roles as are required to support the brand owner's business processes. The configuration settings described in this chapter are the suggested settings for the following roles in Oracle CRM On Demand for Partner Relationship Management:

- **Channel manager role.** You typically assign the channel manager role to one or more users in the brand owner company who are responsible for maintaining the relationship between the partner organizations and the brand owner company.
- **Partner sales representative role.** The partner sales representative role is suitable for users who are members of partner organizations. Users from partner organizations typically have access only to records that relate specifically to their partner organization.
- **Partner administrator role.** You usually give the partner administrator role to one or more users in a partner organization. These users have the responsibility for creating and editing the partner users of Oracle CRM On Demand. It is recommended that you set this role in a similar fashion as the partner sales representative role, but with some additional access. Some brand owners will choose not to use this role.

Your company might require roles other than those described in this topic. Before you begin your configuration tasks, do the following:

- Contact Customer Care to have Oracle CRM On Demand for Partner Relationship Management provisioned for your company, as described in Provisioning Oracle CRM On Demand for Partner Relationship Management on page 11.
- Determine the fields, page layouts, access profiles, and roles that you must configure to support your company's business needs. Your company requirements might differ from the settings suggested in this chapter.

Upgrading from Previous Releases

When upgrading Oracle CRM On Demand for Partner Relationship Management from previous releases to Release 18, you must perform the following task:

- Manual Migration of Fund Requests on page 14

Manual Migration of Fund Requests

Record types Special Pricing Request and MDF Request replace the Fund Requests record type. If you have been using fund requests, you can either continue using them or manually migrate them to the newly introduced Special Pricing Requests and MDF Requests record types. It is recommended that you do the latter with the current release.

You can migrate fund requests either directly after the upgrade or later, depending on your needs. After the migration, you must not use Fund Requests with Special Pricing Requests and MDF Requests, because this will be problematic. You can access the existing fund request records through the new record types.

The manual migration to the new record types involves using the Oracle CRM On Demand for Partner Relationship Management user interface and the batch update capabilities. A script is not provided. Before the migration, all of the fund request records that will be included in this process must have the record type defined as SPA or MDF.

Complete the steps in the following procedure to manually migrate fund requests.

To manually migrate fund requests

1. Define the principal partner account for each migrated record.

   For more information on creating and modifying partner records, see *Oracle CRM On Demand Online Help*.

   For example, you can set the principal partner account as the partner organization of the record owner.

2. Migrate the Fund Request Status field values to the Special Pricing and MDF Request Submission Status, Approval Status, and Claim Status field values as shown in the table below:

Fund Request Field	Special Pricing or MDF Request Field		
Status	**Submission Status**	**Approval Status**	**Claim Status**
In Process	Not Submitted	Blank	Blank
Pre-Approval Submitted	Submitted	Pending Approval (this status is set automatically after updating the Submission Status)	Blank
Pre-Approval Denied	Submitted	Rejected	Blank
Pre-Approved	Submitted	Approved	In Progress
Claim Submitted	Submitted	Approved	Claim Submitted
Claim Denied	Submitted	Approved	Claim Denied
Claim Approved	Submitted	Approved	Claim Approved

   a. For all fund request submission status fields except In Process, you must set Submission Status to Not Submitted, save the record, and then set it to Submitted.

   b. For all Special Pricing and MDF Request Approval Status fields except In Process and Pre-Approval Submitted, you must set the Submission Status, save the record, and then update the Approval Status.

NOTE: You must ensure accurate migration of status field values, because these field values determine the logic for other record types that utilize funds.

3 In Oracle CRM On Demand, Remove Fund Requests from User Roles, Access Profiles, Related Item lists, and so on. Replace Fund Requests with the Special Pricing Requests or MDF Requests accordingly.

After the manual migration, the Special Pricing and MDF Request fields must map to the corresponding Fund Request fields (depending on the type of fund request) as shown in the following table:

Fund Request Field	Special Pricing Request Fields	MDF Request Fields
Pre-Approval Req.	Total Amount Requested	Amount Requested
Granted	Total Amount Authorized	Amount PreApproved
Claim Req.	Total Claim Amount Req.	Total Claim Amount Requested
Approved	Total Claim Amount Approved	Total Claim Amount Approved
Pre-Approval Date	Not Applicable	Pre-Approval Date

Roadmap for Configuring Oracle CRM On Demand for Partner Relationship Management

To configure Oracle CRM On Demand for Partner Relationship Management, perform the following processes and tasks:

1. Setting Up Page Layouts on page 16
2. Setting Up Access Profiles for Partner Roles on page 74
3. Creating Partner Roles on page 87
4. Adding Partner Users on page 98
5. Process of Configuring Books and Workflow Rules for Oracle CRM On Demand for Partner Relationship Management on page 99

Setting Up Page Layouts

This task is a step in Roadmap for Configuring Oracle CRM On Demand for Partner Relationship Management on page 16.

It is recommended that you set up page layouts for each role that you intend to create in Oracle CRM On Demand for Partner Relationship Management.

When setting up a page layout, you can create a new layout, or you can copy or edit an existing layout. You can add fields to the page layout as well as to the sections within the page, and you can also make available the related information in the page layout.

Record Types for Which PRM Administrators Set Up Page Layouts

PRM administrators typically set up page layouts for both the channel manager role and for the partner sales representative role.

Channel Manager Role

The following are the page layouts for the channel manager role:

- Accreditation
- Accreditation Request
- Certification
- Certification Request
- Course
- Course Enrollment
- Deal Registration
- Exam
- Exam Registration
- Fund
- Fund Request
- MDF Request
- Special Pricing Request
- Special Pricing Product
- Price List
- Price List line Item
- Lead
- Opportunity
- Service Request
- Solution
- Application
- Business Plan
- Objective

Partner Sales Representative Role

The following are the page layouts for the partner sales representative role:

- Accreditation
- Accreditation Request

- Certification
- Certification Request
- Course
- Course Enrollment
- Deal Registration
- Exam
- Exam Registration
- Fund
- Fund Request
- MDF Request
- Special Pricing Request
- Special Pricing Product
- Lead
- Opportunity
- Partner. It is recommended that Partner pages are not given to partner sales reps.
- Partner Program
- Service Request. It is recommended that service requests are also made available to a separate partner service representative role for partner employees who primarily work on service requests.
- Solution
- Application
- Objective. Consider your company's business processes and decide whether objective pages should be available to partner sales reps.

Complete the steps in the following procedure for each page layout that you want to set up.

NOTE: Some of the suggested page layouts for the partner sales representative role are copies of the page layouts for the channel manager role. Complete the setup of the page layouts for the channel manager role before you copy the channel manager role page layouts for use in the partner sales representative role.

To set up a page layout for Oracle CRM On Demand for Partner Relationship Management

1. In Oracle CRM On Demand, click the Admin link, then Application Customization.
2. In the Record Type Setup section, click the link for the required record type.

   For example, click the Opportunity record type. For more information, see the following:

   - For information on the typical page layouts for the channel manager role, see Page Layouts for the Channel Manager Role on page 20.

- For information on the typical page layouts for the partner sales representative role, see Page Layouts for the Partner Sales Representative Role on page 51.

3. In the Page Layout Management section, click the link for the required page layout type.

   For example, click the link for the Opportunity Page Layout.

4. Perform the following steps:

   a. On the *record type* Page Layout page, click Copy (the link next to a layout) to create a new layout that is based on an existing layout, or click New Layout on the title bar to create a new layout.

   b. In Step 1 of the Page Layout Wizard, enter a name for the layout and a description (optional).

   c. Click Finish to save the layout.

   NOTE: You will return later to the Page Layout Wizard to finish setting up the page layout.

5. On the *record type* Page Layout page, click the Edit Sections link for the layout that you want to configure.

6. In the Section Names Setup page, enter the labels for any new sections that you want to set up on the page layout.

   - For information on the typical page sections for the channel manager role, see Page Sections for the Channel Manager Role Page Layouts on page 22.

   - For information on the typical page sections for the partner sales representative role, see Page Sections for Page Layouts for the Partner Sales Representative Role on page 52.

7. Click Save.

8. On the *record type* Page Layout page, click the Edit link for the layout that you want to configure.

9. In the Page Layout Wizard, go to Step 2 (Field Setup), and specify the field setup for the page layout.

   For each available field, select either the Required or the Read-Only check box to support your business processes. For more information, see the following:

   - For more information on typical fields and field layouts (including details of required fields) for the channel manager role, see Page Layouts for the Channel Manager Role Page Layouts on page 26.

   - For more information on typical fields and field layouts (including details of required fields) for the partner sales representative role, see Page Section Layouts for Page Layouts for the Partner Sales Representative Role on page 52.

10. In the wizard, go to Step 3 (Field Layout), and configure the field layout for the page.

    Click the arrows to add fields to the various page sections. Remove any fields that you do not want by moving them from the page sections to the Available Fields list. For more information, see the following:

    - For more information on typical field layouts for the channel manager role, see Page Layouts for the Channel Manager Role Page Layouts on page 26.

    - For more information on typical field layouts for the partner sales representative role, see Page Layouts for the Channel Manager Role Page Layouts on page 26.

11 In the wizard, go to Step 4 (Related Information), and configure the related information that is available on this page.

Click the arrows to add fields to the appropriate sections. The options are as follows: Additional Information and Displayed Information. For more information, see the following:

- For more information on typical related information sections for the channel manager role, see Related Information Sections for the Channel Manager Role Page Layouts on page 46.
- For more information on typical related information sections for the partner sales representative role, see Page Layouts for Related Information Sections for the Partner Sales Representative Role on page 70.

12 Click Finish.

Page Layout Configurations for the Channel Manager Role

This topic describes the page layout modifications that PRM administrators typically configure for the channel manager role. It contains the following:

Page Layouts for the Channel Manager Role

Table 1 shows examples of specific layouts that support the channel manager role.

NOTE: The channel manager role is based on a copy of the PRM administrator role so the layouts are preconfigured. Table 1 provides the specific layouts used to create the role definition. After you create the role definitions, you must change them as shown in the following table, before you add them to the role definitions already present on the copy of the PRM administrator role. Change the other record types for the page layouts only if your business requires it.

Table 1. Page Layouts for the Channel Manager Role

Record Type	Page Layout to Copy	New Page Layout Name
Lead	Lead Page Standard Layout	Lead Page Channel Manager Layout
Opportunity	Opportunity Page Standard Layout	Opportunity Page Channel Manager Layout
Solution	Solution Page Standard Layout	Solution Page Channel Manager Layout

Table 1. Page Layouts for the Channel Manager Role

Record Type	Page Layout to Copy	New Page Layout Name
Service Request	Service Request Page Standard Layout	Service Request Page Channel Manager Layout
Business Plan	Business Plan Page Standard Layout	Business Plan Page Channel Manager Layout
Objective	Objective Page Standard Layout	Objective Page Channel Manager Layout
Deal Registration	Deal Registration Page Standard Layout	Deal Registration Page Channel Manager Layout
Accreditation	Accreditation Page Standard Layout	Accreditation Page Channel Manager Layout
Accreditation Request	Accreditation Request Page Standard Layout	Accreditation Request Page Channel Manager Layout
Certification	Certification Page Standard Layout	Certification Page Channel Manager Layout
Certification Request	Certification Request Page Standard Layout	Certification Request Page Channel Manager Layout
Course	Course Page Standard Layout	Course Page Channel Manager Layout
Course Enrollment	Course Enrollment Page Standard Layout	Course Enrollment Page Channel Manager Layout
Exam	Exam Page Standard Layout	Exam Page Channel Manager Layout
Exam Registration	Exam Registration Page Standard Layout	Exam Registration Page Channel Manager Layout
Fund Request	Fund Request Page Standard Layout	Fund Request Page Channel Manager Layout
MDF Request	MDF Request Page Standard Layout	MDF Request Page Channel Manager Layout
Special Pricing Request	Special Pricing Request Page Standard Layout	Special Pricing Request Page Channel Manager Layout
Special Pricing Product	Special Pricing Product Page Standard Layout	Special Pricing Product Page Channel Manager Layout
Price List	Price List Page Standard Layout	Price List Page Channel Manager Layout
Price List Line Item	Price List Line Item Page Standard Layout	Price List Line Item Page Channel Manager Layout

Table 1. Page Layouts for the Channel Manager Role

Record Type	Page Layout to Copy	New Page Layout Name
Product	Product Page Standard Layout	Product Page Channel Manager Layout
Partner	Partner Page Standard Layout	Partner Page Channel Manager Layout
Application	Application Page Standard Layout	Application Page Channel Manager Layout

Page Sections for the Channel Manager Role Page Layouts

Table 2 describes the sections that company administrators typically set up for page layouts for the channel manager role.

Table 2. Page Sections for the Channel Manager Page Role Page Layouts

Page Layout	Existing Section Name	New Section Name
Fund Request Page Channel Manager Layout	Key Fund Request Information	Do not rename.
	Fund Request Detail Information	Preapproval Information.
	Additional Information	Claim Information.
	Available Section	Additional Information.
Lead Page Channel Manager Layout	Key Lead Information	Do not rename.
	Opportunity Related Information	Do not rename.
	Additional Information	Owner Information.
	Available Section	Additional Information.
Opportunity Page Channel Manager Layout	Key Opportunity Information	Do not rename.
	Sales Detail Information	Do not rename.
	Additional Information	Owner Information.
	Available Section	Additional Information.
Solution Page Channel Manager Layout	Solution Detail Information	Solution Detail Information.
	Additional Information	Additional Information.

Table 2. Page Sections for the Channel Manager Page Role Page Layouts

Page Layout	Existing Section Name	New Section Name
Service Request Page Channel Manager Layout	Contact Information	Do not rename.
Business Plan Page Channel Manager Layout	Key Plan Information	Do not rename.
	SWOT Analysis	Do not rename.
Objective Plan Page Channel Manager Layout	Key Objective Information	Do not rename.
	Target Information	Do not rename.
	Additional Information	Do not rename.
Fund	Key Fund Information	Do not rename.
	Additional Information	Do not rename.
Fund Request	Key Fund Request Information	Do not rename.
	Fund Request Detail Information	Preapproval Information.
	Additional Information	Claim Information.
	Available Section	Additional Information.
Deal Registration	Deal Registration Key Information	Do not rename.
	Opportunity Information	Do not rename.
	Customer Information	Do not rename.
	Approval Information	Do not rename.
	Additional Information	Do not rename.
MDF Request	Key MDF Request Information	Do not rename.
	MDF Request Detail Information	Do not rename.
	Claim Information	Do not rename.
	Additional Information	Do not rename.
Special Pricing Request	Key Special Pricing Request Information	Do not rename.
	Special Pricing Request Detail Information	Do not rename.
	Claim Information	Do not rename.

Table 2. Page Sections for the Channel Manager Page Role Page Layouts

Page Layout	Existing Section Name	New Section Name
	Additional Information	Do not rename.
Special Pricing Product	Key Product Information	Do not rename.
	Special Pricing Request Detail Information	Do not rename.
	Special Pricing Request Justification	Do not rename.
	Additional Information	Do not rename.
Price List	Key Price List Information	Do not rename.
	Additional Information	Do not rename.
Price List Line Item	Key Product Information	Do not rename.
	Key Product Line Item Information	Do not rename.
	Additional Information	Do not rename.
Application	Company Profile	Do not rename.
	Application Submitted By	Do not rename.
	Partnership Information	Do not rename.
	Additional Information Section	Do not rename.
Partner	Key Partner Information	Do not rename.
	Profile Information	Do not rename.
	Additional Company Profile	Do not rename.
	Additional Information	Do not rename.
Accreditation Page Channel Manager Layout	Key Information	Do not rename.
	Accreditation Details	Do not rename.
	Contact Information	Do not rename.
	Additional Information	Do not rename.
Accreditation Request Page Channel Manager Layout	Key Request Information	Do not rename.
	Additional Information	Do not rename.
Certification Page Channel Manager Layout	Key Information	Do not rename.

Table 2. Page Sections for the Channel Manager Page Role Page Layouts

Page Layout	Existing Section Name	New Section Name
	Certification Details	Do not rename.
	Contact Information	Do not rename.
	Additional Information	Do not rename.
Certification Request Page Channel Manager Layout	Key Request Information	Do not rename.
	Additional Information	Do not rename.
Course Page Channel Manager Layout	Key Information	Do not rename.
	Course Details	Do not rename.
	Contact Information	Do not rename.
	Other Information	Do not rename.
Course Enrollment Page Channel Manager Layout	Key Enrollment Information	Do not rename.
	Additional Information	Do not rename.
Exam Page Channel Manager Layout	Key Information	Do not rename.
	Exam Details	Do not rename.
	Contact Information	Do not rename.
	Additional Information	Do not rename.
Exam Registration Page Channel Manager Layout	Key Registration Information	Do not rename.
	Additional Information	Do not rename.

Page Layouts for the Channel Manager Role Page Layouts

Table 3 shows the page layouts that company administrators typically set up for the channel manager role.

Table 3. Page Layouts for the Channel Manager Role Page Section Layouts

Page Layout	Page Section Layout
MDF Request	**Key MDF Request Information**
	Request ID
	Request Name
	Principal Partner Account
	Fund
	Submission Status
	Due Date
	Expiration Date
	Campaign
	Marketing Purpose
	Region
	Category
	Partner Program
	MDF Request Currency
	None
	MDF Request Detail Information
	Start Date
	End Date
	Amount Requested
	Amount PreApproved
	Approval Status
	Request Date
	Submitted Date
	Pre-Approval Date
	Approver
	Last Approved By
	Reason Code

Table 3. Page Layouts for the Channel Manager Role Page Section Layouts

Page Layout	Page Section Layout
	Claim Information
	Total Claim Amount Requested
	Total Claim Amount Approved
	Claim Status
	Claim Decision Date
	Additional Information
	Owner
	Modified
	Owner Partner Account
	Description
Deal Registration	**Deal Registration Key Information**
	Name
	Type
	Submission Status
	Expiration Date
	Special Price Reqd
	ID
	Principal Partner
	Principal Partner Location
	Partner Program
	Support Reqd
	Opportunity Information
	Associated Opportunity
	New Opportunity
	Currency
	Deal Size
	Close Date
	Product Interest
	Next Step
	Customer Information
	Associated Customer

Table 3. Page Layouts for the Channel Manager Role Page Section Layouts

Page Layout	Page Section Layout
	New Customer
	Company Name
	Country
	Address 1
	Address 2
	City
	Province
	Post Code
	Fax
	Associated Contact
	New Contact
	Mr./Ms.
	First Name
	Middle Name
	Last Name
	Job Title
	Email
	Telephone #
	Cell Phone
	Approval Information
	Approval Status
	Current Approver
	Final Approver
	Submitted Date
	Approved Date
	Reject Reason
	Additional Information
	Owner
	Owner Partner Account
	Originating Partner Account
	Created

Table 3. Page Layouts for the Channel Manager Role Page Section Layouts

Page Layout	Page Section Layout
	Modified
	Description
Special Pricing Request	**Key Special Pricing Request Information**
	ID
	Request Name
	Principal Partner Account
	Submission Status
	Due Date
	Fund
	Opportunity
	End Customer
	Originating Partner Account
	Deal Registration
	Partner Program
	Currency
	Special Pricing Request Detail Information
	Start Date
	End Date
	Total Amount Requested
	Total Amount Authorized
	Approval Status
	Request Date
	Submitted Date
	Authorized Date
	Approver
	Last Approved By
	Reason Code
	Claim Information
	Total Claim Amount Requested
	Total Claim Amount Approved
	Claim Status

Table 3. Page Layouts for the Channel Manager Role Page Section Layouts

Page Layout	Page Section Layout
	Claim Decision Date
	Additional Information
	Owner
	Modified
	Owner Partner Account
	Description
Special Pricing Product	**Key Product Information**
	Product
	Product: Product Category
	Quantity
	Currency
	Product: Part #
	Product: Type
	Product: Status
	MSRP
	Special Pricing Request Detail Information
	Purchase Cost
	Requested Cost
	Requested Resale Price
	Authorized Cost
	Suggested Resale Price
	Requested Amount
	Requested Discount Percent
	Authorized Amount
	Authorized Discount Percent
	Special Pricing Request Justification
	Competitor Name
	Competitor Product
	Competitor Product Price
	Competitive Partner
	Other Competitive Information

Table 3. Page Layouts for the Channel Manager Role Page Section Layouts

Page Layout	Page Section Layout
	Additional Information
	Created
	Description
	Modified
Price List	**Key Price List Information**
	Price List Name
	Effective From
	Effective To
	Type
	Status
	Currency
	Additional Information
	Created
	Description
	Modified
Price List Line Item	**Key Product Line Item Information**
	Price List
	Product
	Effective From*
	Effective To
	Product: Part #
	Price List
	List Price
	Additional Information
	Created
	Description
	Modified
Fund Request Page Channel Manager Layout	**Key Fund Request Information**
	Request Id
	Fund Request Name

Table 3. Page Layouts for the Channel Manager Role Page Section Layouts

Page Layout	Page Section Layout
	Fund
	Type
	Status
	Opportunity
	Opportunity Account
	Due Date
	Fund Request Currency
	Preapproval Information
	Pre-Approval Req
	Granted
	Pre-Approval Date
	Begin Date
	End Date
	Claim Information
	Claim Req.
	Approved
	Request Date
	Claim Decision Date
	Additional Information
	Owner
	Owner Account
	Channel Manager
	Approver
Lead Page Channel Manager Layout	**Key Lead Information**
	Mr. Ms
	First Name
	Last Name
	Company
	Job Title
	Created External
	Primary Phone #

Table 3. Page Layouts for the Channel Manager Role Page Section Layouts

Page Layout	Page Section Layout
	Cellular Phone
	Work Fax #
	Email
	Never Email
	Modified External
	Opportunity Related Information
	Status
	Rating
	Product Interest
	Potential Revenue
	Estimated Close Date
	Next Step
	Lead Currency
	Source
	Campaign
	Industry
	Annual Revenues
	Number of Employees
	Owner Information
	Owner Full Name
	Ownership Status
	Reassign Owner
	Owner Account
	Channel Manager
	Sales Person
	Additional Information
	Associated Account
	Associated Contact
	Associated Opportunity
	Billing
	Website

Table 3. Page Layouts for the Channel Manager Role Page Section Layouts

Page Layout	Page Section Layout
Opportunity Page Channel Manager Layout	**Key Opportunity Information**
	Opportunity Name
	Account
	Sales Stage
	Next Step
	Registration Status
	Approval Status
	Revenue
	Partner Program
	Close Date
	Forecast
	Opportunity Currency
	Territory
	Sales Detail Information
	Status
	Priority
	Lead Source
	Opportunity Type
	Product Interest
	Probability%
	Expected Revenue
	Source Campaign
	Reason Won/Lost
	Registration Information
	Registration Status*
	Registered Partner*
	Registration Expires*
	Registered Partner Location*
	Owner Information
	Owner

Table 3. Page Layouts for the Channel Manager Role Page Section Layouts

Page Layout	Page Section Layout
	Ownership Status
	Approver
	Owner Account
	Reassign Opportunity
	Channel Account Manager
	Additional Information
	Modified By:
	Created By:
	Modified: Date External
	Created:
Partner Page Channel Manager Layout	**Key Partner Information**
	Partner Name
	Primary Partner Type
	Location
	Partner Organization Status
	Maximum Number of Users
	Main Phone #
	Main Fax #
	Web Site
	Price List
	Number of Active Users
	Profile Information
	Description
	Additional Company Profile
	Billing
	Company Identifier
	Annual Revenues
	Number of Employees
	Industry
	Shipping

Table 3. Page Layouts for the Channel Manager Role Page Section Layouts

Page Layout	Page Section Layout
	Expertise
	Region
	Partner Currency
	Additional Information
	Created
	Owner
	Owner Partner Account
	Originating Partner Account
	Modified External
	Channel Account Manager
	Principal Partner Account
Solution Page Channel Manager	**Solution Detail Information**
	Solution ID
	Title
	Product
	Product Category
	Solution Rating
	Number of Ratings
	Status
	Published
	Publish to PRM
	Externally Published
	Service Request Count
	Created External
	Modified External
Service Request Page Channel Manager Layout	**Contact Information**
	Service Number
	Account
	Principal Partner Account
	Contact

Table 3. Page Layouts for the Channel Manager Role Page Section Layouts

Page Layout	Page Section Layout
	Work Phone #
	Email
	Service Detail Information
	Area
	Cause
	Type
	Source
	Modified External
	Created External
	SR Currency
	Priority
	Status
	Opened Time
	Closed Time
	Owner
	Owner Partner Account
	Reassign
Business Plan Page Channel Manager Layout	**Key Plan Information**
	Plan Name
	Period
	Period: Start Date
	Period: End Date
	Type
	Status
	Principal Partner Account
	Product Name
	Plan Revenue
	Currency
	Owner
	Description

Table 3. Page Layouts for the Channel Manager Role Page Section Layouts

Page Layout	Page Section Layout
	SWOT Analysis
	Strengths
	Weaknesses
	Opportunities
	Threats
Accreditation Page Channel Manager Layout	**Key Information**
	Name
	Type
	Status
	Available From
	Accreditation ID
	Primary Product Category
	Primary Product
	Available Till
	Accreditation Detail
	Validity (Months)
	Renewable
	Website
	Currency
	Accreditation Fee
	Payment Options
	Contact Information
	Contact
	Contact: First Name
	Contact: Last Name
	Contact: Account
	Contact: Email
	First Name
	Last Name
	Account

Table 3. Page Layouts for the Channel Manager Role Page Section Layouts

Page Layout	Page Section Layout
	E-mail
	Phone
	Additional Information
	Created By
	Created: Date
	Owner
	Modified By
	Modified: Date
	Description
Accreditation Request Page Channel Manager Layout	**Key Request Information**
	Accreditation
	Objective
	Request Date
	Accreditation Number
	Renewable
	Partner
	Accreditation Date
	Accreditation Status
	Expiration Date
	Additional Information
	Created By
	Created: Date
	Owner
	Modified By
	Modified: Date
	Description
Certification Page Channel Manager Layout	**Key Information**
	Name
	Type

Table 3. Page Layouts for the Channel Manager Role Page Section Layouts

Page Layout	Page Section Layout
	Status
	Available From
	Certification ID
	Primary Product Category
	Primary Product
	Available Till
	Certification Details
	Validity (Months)
	Renewable
	Website
	Currency
	Certification Fee
	Payment Options
	Contact Information
	Contact
	Contact: First Name
	Contact: Last Name
	Contact: Account
	Contact: Email
	First Name
	Last Name
	Account
	E-mail
	Phone
	Additional Information
	Created By
	Created: Date
	Owner
	Modified By
	Modified: Date
	Description

Table 3. Page Layouts for the Channel Manager Role Page Section Layouts

Page Layout	Page Section Layout
Certification Request Page Channel Manager Layout	**Key Request Information**
	Certification
	Objective
	Request Date
	Certification Number
	Renewable
	Candidate
	Certification Date
	Certification Status
	Expiration Date
	Additional Information
	Created By
	Created: Date
	Owner
	Modified By
	Modified: Date
	Description
Course Page Channel Manager Layout	**Key Information**
	Name
	Type
	Status
	Available From
	Course ID
	Primary Product Category
	Primary Product
	Available Till
	Course Details
	Duration (Hours)
	Course Length (Days)
	Format

Table 3. Page Layouts for the Channel Manager Role Page Section Layouts

Page Layout	Page Section Layout
	Medium
	External Unique ID
	Website
	Hands-On Lab
	Exam
	Currency
	Course Fee
	Payment Options
	Objective
	Contact Information
	Contact
	Contact: First Name
	Contact: Last Name
	Contact: Account
	Contact: Email
	First Name
	Last Name
	Account
	E-mail
	Phone
	Additional Information
	Created By
	Created: Date
	Owner
	Modified By
	Modified: Date
	Description
Course Enrollment Page Channel Manager Layout	**Key Request Information**
	Course
	Objective

Table 3. Page Layouts for the Channel Manager Role Page Section Layouts

Page Layout	Page Section Layout
	Enrollment Date
	Enrollment Status
	Candidate
	Enrollment Number
	Completion Date
	Course Partner
	Additional Information
	Created By
	Created: Date
	Owner
	Modified By
	Modified: Date
Exam Page Channel Manager Layout	**Key Information**
	Name
	Type
	Status
	Available From
	Exam ID
	Primary Product Category
	Primary Product
	Available Till
	Exam Details
	Number of Questions
	Time Allowed (Minutes)
	Maximum Score
	Passing Score
	Validity (Months)
	Website
	Format
	Medium
	Grading Method

Table 3. Page Layouts for the Channel Manager Role Page Section Layouts

Page Layout	Page Section Layout
	Currency
	Exam Fee
	Payment Options
	Contact Information
	Contact
	Contact: First Name
	Contact: Last Name
	Contact: Account
	Contact: Email
	First Name
	Last Name
	Account
	E-mail
	Phone
	Additional Information
	Created By
	Created: Date
	Owner
	Modified By
	Modified: Date
	Description
Exam Registration Page Channel Manager Layout	**Key Information**
	Exam
	Objective
	Registration Date
	Registration Status
	Exam Partner
	Score Expires On
	Candidate
	Registration Number

Table 3. Page Layouts for the Channel Manager Role Page Section Layouts

Page Layout	Page Section Layout
	Completion Date
	Score Achieved
	Grade Achieved
	Exam Date

NOTE: The Effective From date on the Price List Line Item page layout does not display the Effective From date of the associated price list by default.

The fields marked with an asterisk (*) in the Registration Information section (under the Opportunity Page Channel Manager Layout) of Table 3 will be populated only if you use the Deal Registration record type to manage your deal registrations. These fields will not be populated if you continue to use Opportunity record type to track and manage your deal registrations. In such cases, you can remove the Registration Information section from the layout.

Related Information Sections for the Channel Manager Role Page Layouts

Table 4 shows the related information sections that company administrators typically make available (that is, move to the Displayed Information section) in the page layouts for the channel manager role.

Table 4. Related Item Information sections for the Channel Manager Role Page Layouts

Page Layout	Related Information Sections in the Displayed Information Section
Fund Request Page Channel Manager Layout	Attachments
	Notes
	Open Activities
	Completed Activities
MDF Request Page Channel Manager Layout	Activities
	Books
	MDF Request Teams
	MDF Request Attachments
	Audit Trail
Deal Registration Page Channel Manager Layout	Deal Registration Teams
	Special Pricing Requests
	Activities
	Deal Registration Product Revenues
	Audit Trail
Special Pricing Request Page Channel Manager Layout	Special Pricing Products
	Activities
	Books
	Special Pricing Request Teams
	Special Pricing Request Attachments
	Audit Trail
Special Pricing Product Page Channel Manager Layout	None
Price List Page Channel Manager Layout	Price List Line Items
Price List Line Item Page Channel Manager Layout	None

Table 4. Related Item Information sections for the Channel Manager Role Page Layouts

Page Layout	Related Information Sections in the Displayed Information Section
Product Page Channel Manager Layout	Price List Line Items
Application Page Channel Manager Layout	Activities
	Application Teams
	Books
	Application Attachments
	Audit Trail
Partner Page Channel Manager Layout	Partner Type
	Partner Relationships
	Partner User Roles
	Addresses
	Applications
	Deal Registrations (if needed)
	Lead (if needed)
	MDF Requests (if needed)
	Special Pricing Requests (if needed)
	Notes
	Books
	Partner Organization Books
	Partner Campaigns
	Partner Plans
Lead Page Channel Manager Layout	Lead Partners
	Open Activities
	Completed Activities
	Attachments
	Lead Qualification Scripts
Opportunity Page Channel Manager Layout	Opportunity Partners
	Leads
	Opportunity Team
	Contacts
	Product Revenues

Table 4. Related Item Information sections for the Channel Manager Role Page Layouts

Page Layout	Related Information Sections in the Displayed Information Section
	Notes
	Open Activities
	Completed Activities
	Opportunity Competitors
	Attachments
	Books
	Deal Registrations (if needed)
	Special Pricing Requests (if needed)
	Audit Trail
Solution Page Channel Manager Layout	Related Solutions
	Service Requests
	Attachments
Service Request Page Channel Manager Layout	Solutions
	Open Activities
	Completed Activities
	Notes
	Audit Trail
	Attachments
	Service Request Teams
	Books
Business Plan Page Channel Manager Layout	Objectives
	Activities
	Business Plans
	Business Plan Teams
	Accreditation Requests
Objective Page Channel Manager Layout	Activities
	Objective Teams
	Leads
	Deal Registrations
	Opportunities

Table 4. Related Item Information sections for the Channel Manager Role Page Layouts

Page Layout	Related Information Sections in the Displayed Information Section
	Special Pricing Requests
	MDF Requests
	Service Requests
Accreditation Page Channel Manager Layout	Accreditation Attachments
	Books
	Accreditation Product Categories
	Accreditation Products
	Accreditation Solutions
	Related Accreditations
	Accreditation Certifications
	Accreditation Requests
	Accreditation Team
Certification Page Channel Manager Layout	Certification Attachments
	Books
	Certification Product Categories
	Certification Products
	Certification Solutions
	Related Certifications
	Certification Courses
	Certification Exams
	Accreditation Certifications
	Certification Requests
	Certification Team
Course Page Channel Manager Layout	Course Attachments
	Books
	Course Product Categories
	Course Products
	Course Solutions
	Course Partners
	Related Courses

Table 4. Related Item Information sections for the Channel Manager Role Page Layouts

Page Layout	Related Information Sections in the Displayed Information Section
	Course Exams
	Certification Courses
	Course Enrollments
	Course Team
Exam Page Channel Manager Layout	Exam Attachments
	Books
	Exam Product Categories
	Exam Products
	Exam Solutions
	Exam Partners
	Related Exams
	Course Exams
	Certification Exams
	Exam Registrations
	Courses
	Exam Team

NOTE: You must not use the provided Standard Related Items Layout for Price List Line Items for the Product Page Channel Manager Layout. For Price List Line Items on the Product record type, you must create a new Related Items Layout named Product Price List Layout. The new Related Items Layout must include the following fields: Price List Name, Price Type, List Price, Currency, Effective From, Effective To, Price List: Status, and this new Related Items Layout must be selected on the Product Page Channel Manager Layout for Price List Line Items.

Page Layout Modifications for the Partner Sales Representative Role

This topic describes the page layout modifications that are suggested for the partner sales representative role. It contains the following information:

- Page Layouts for the Partner Sales Representative Role on page 51
- Page Sections for Page Layouts for the Partner Sales Representative Role on page 52
- Page Section Layouts for Page Layouts for the Partner Sales Representative Role on page 52
- Page Layouts for Related Information Sections for the Partner Sales Representative Role on page 70

Page Layouts for the Partner Sales Representative Role

Some of the suggested page layouts for the partner sales representative role are copies of the page layouts for the channel manager role. You must modify the page layouts for the channel manager role before you copy the layouts for the partner sales representative role.

Table 5 shows the page layouts that company administrators typically set up for the partner sales representative role.

Table 5. Page Layouts for the Partner Sales Representative Role

Record Type	Existing Page Layout Name	New Page Layout Name
Fund	Fund Page Standard Layout	Fund Page Partner Sales Representative Layout
Fund Request	Fund Request Page Standard Layout	Fund Request Page Partner Sales Representative Layout
Leads	Lead Page Channel Manager Layout	Lead Page Partner Sales Representative Layout
Opportunity	Opportunity Page Channel Manager Layout	Opportunity Page Partner Sales Representative Layout
Partner Program	Partner Program Page Standard Layout	Partner Program Page Partner Sales Representative Layout
Solution	Solution Page Channel Manager Layout	Solution Page Partner Sales Representative Layout
Deal Registration	Deal Registration Page Standard Layout	Deal Registration Page Partner Sales Representative Layout
MDF Request	MDF Request Page Standard Layout	MDF Request Page Partner Sales Representative Layout
Special Pricing Request	Special Pricing Request Page Standard Layout	Special Pricing Request Partner Sales Representative Layout
Special Pricing Product	Special Pricing Product Page Standard Layout	Special Pricing Product Partner Sales Representative Layout
Service Request	Service Request Page Standard Layout	Service Request Page Partner Representative Layout
Objective	Objective Page Standard Layout	Objective Page Partner Sales Representative Layout
Accreditation	Accreditation Page Channel Manager Layout	Accreditation Page Partner Sales Representative Layout
Accreditation Request	Accreditation Request Page Channel Manager Layout	Accreditation Request Page Partner Sales Representative Layout
Certification	Certification Page Channel Manager Layout	Certification Page Partner Sales Representative Layout

Table 5. Page Layouts for the Partner Sales Representative Role

Record Type	Existing Page Layout Name	New Page Layout Name
Certification Request	Certification Request Page Channel Manager Layout	Certification Request Page Partner Sales Representative Layout
Course	Course Page Channel Manager Layout	Course Page Partner Sales Representative Layout
Course Enrollment	Course Enrollment Page Channel Manager Layout	Course Enrollment Page Partner Sales Representative Layout
Exam	Exam Page Channel Manager Layout	Exam Page Partner Sales Representative Layout
Exam Registration	Exam Registration Page Channel Manager Layout	Exam Registration Page Partner Sales Representative Layout

Page Sections for Page Layouts for the Partner Sales Representative Role

The suggested page sections for the partner sales representative role are the same as the page sections for the channel manager role as shown in Table 2. When you create the page layouts for the partner sales representative page role by copying the page layouts for the channel manager role, do not configure any additional sections for the page layouts for the partner sales representative role.

Page Section Layouts for Page Layouts for the Partner Sales Representative Role

Table 6 shows the page section layouts that company administrators typically set up for the page layouts for the partner sales representative role. It is recommended that you change the fields that are followed by an asterisk (*) to be read-only fields. You make this change in the field setup section of the page layout wizard. It is recommended that all other fields that are read-only by default remain as read-only fields.

Table 6. Page Section Layouts for Page Layouts for the Partner Sales Representative Role

Page Layout	Page Section Layout
MDF Request	**Key MDF Request Information**
	Request ID
	Request Name
	Principal Partner Account
	Fund

Table 6. Page Section Layouts for Page Layouts for the Partner Sales Representative Role

Page Layout	Page Section Layout
	Submission Status
	Due Date
	Expiration Date*
	Campaign
	Marketing Purpose
	Region
	Category
	Partner Program
	MDF Request Currency
	MDF Request Detail Information
	Start Date
	End Date
	Amount Requested
	Amount PreApproved*
	Approval Status*
	Request Date*
	Submitted Date*
	Pre-Approval Date*
	Approver*
	Last Approved By*
	Reason Code*
	Claim Information
	Total Claim Amount Requested
	Total Claim Amount Approved*
	Claim Status
	Claim Decision Date*
	Additional Information
	Owner
	Modified
	Owner Partner Account
	Description

Table 6. Page Section Layouts for Page Layouts for the Partner Sales Representative Role

Page Layout	Page Section Layout
Deal Registration	**Deal Registration Key Information**
	Name
	Type
	Submission Status
	Expiration Date
	Special Price Reqd
	ID
	Principal Partner
	Principal Partner Location
	Partner Program
	Support Reqd
	Opportunity Information
	Associated Opportunity
	New Opportunity
	Currency
	Deal Size
	Close Date
	Product Interest
	Next Step
	Customer Information
	Associated Customer
	New Customer
	Company Name
	Country
	Address 1
	Address 2
	City
	Province
	Post Code
	None
	None

Table 6. Page Section Layouts for Page Layouts for the Partner Sales Representative Role

Page Layout	Page Section Layout
	Associated Contact
	New Contact
	Mr./Ms.
	First Name
	Middle Name
	Last Name
	Job Title
	Email
	Telephone #
	Cell Phone
	Fax
	Approval Information
	Approval Status*
	Current Approver*
	Final Approver
	Submitted Date
	Approved Date
	Reject Reason*
	Additional Information
	Owner
	Owner Partner Account
	Originating Partner Account
	Description
	Created
	Modified
Special Pricing Request	**Key Special Pricing Request Information**
	Request ID
	Request Name
	Principal Partner Account
	Submission Status
	Due Date

Table 6. Page Section Layouts for Page Layouts for the Partner Sales Representative Role

Page Layout	Page Section Layout
	Opportunity
	End Customer
	Originating Partner Account
	Deal Registration
	Partner Program
	Currency
	Special Pricing Request Detail Information
	Start Date
	End Date
	Total Amount Requested
	Total Amount Authorized*
	Approval Status*
	Request Date*
	Submitted Date*
	Authorized Date*
	Approver*
	Last Approved By*
	Reason Code*
	Claim Information
	Total Claim Amount Requested
	Total Claim Amount Approved*
	Claim Status
	Claim Decision Date*
	Additional Information
	Owner
	Modified
	Owner Partner Account
	Description
Special Pricing Product	**Key Product Information**
	Product
	Product: Product Category

Table 6. Page Section Layouts for Page Layouts for the Partner Sales Representative Role

Page Layout	Page Section Layout
	Quantity
	Currency
	Product: Part #
	Product: Type
	Product: Status
	MSRP*
	Special Pricing Request Detail Information
	Purchase Cost
	Requested Cost
	Requested Resale Price
	Authorized Cost*
	Suggested Resale Price*
	Requested Amount
	Requested Discount Percent
	Authorized Amount
	Authorized Discount Percent
	Special Pricing Request Justification
	Competitor Name
	Competitor Product
	Competitor Product Price
	Competitive Partner
	Other Competitive Information
	Additional Information
	Created
	Description
	Modified
Fund Page Partner Sales Representative Layout	**Key Fund Information**
	Fund ID
	Fund Name*
	Status*

Table 6. Page Section Layouts for Page Layouts for the Partner Sales Representative Role

Page Layout	Page Section Layout
	Allow Negative Balance*
	Type*
	Fund Currency*
	Start Date*
	End Date*
	Additional Information
	Owner
	Modified
Fund Request Page Partner Sales Representative Layout	**Key Fund Request Information**
	Request ID
	Fund Request Name
	Fund
	Type
	Status
	Opportunity
	Opportunity Account
	Due Date
	Fund Request Currency
	Preapproval Information
	Pre-Approval Req
	Granted*
	Pre-Approval Date*
	Begin Date*
	End Date*
	Claim Information
	Claim Req.
	Approved*
	Request Date
	Claim Decision Date*
	Additional Information

Table 6. Page Section Layouts for Page Layouts for the Partner Sales Representative Role

Page Layout	Page Section Layout
	Owner
	Owner Account
	Channel Manager
	Approver*
Lead Page Partner Sales Rep	**Key Lead Information**
	Mr. Ms.
	First Name
	Last Name
	Company
	Job Title
	Created External
	Lead Convert
	Primary Phone #
	Cellular Phone
	Work Fax #
	Email
	Never Email
	Modified External
	Opportunity Related Information
	Status
	Rating
	Product Interest
	Potential Revenue
	Estimated Close Date
	Next Step
	Lead Currency
	Source
	Campaign
	Industry
	Annual Revenues
	Number of Employees

Table 6. Page Section Layouts for Page Layouts for the Partner Sales Representative Role

Page Layout	Page Section Layout
	Owner Information
	Owner Full Name
	Ownership Status
	Reassign Owner
	Owner Account
	Channel Manager
	Sales Person
	Additional Information
	Associated Account
	Associated Contact
	Associated Opportunity
	Billing
	Web Site
Opportunity Page Partner Sales Representative Layout	**Key Opportunity Information**
	Opportunity Name
	Account
	Sales Stage
	Next Step
	Registration Status
	Approval Status*
	Revenue
	Partner Program
	Close Date
	Forecast
	Opportunity Currency
	Territory
	Sales Detail Information
	Status
	Priority
	Lead Source

Table 6. Page Section Layouts for Page Layouts for the Partner Sales Representative Role

Page Layout	Page Section Layout
	Opportunity Type
	Product Interest
	Probability%
	Expected Revenue
	Source Campaign
	Reason Won/Lost
	Owner Information
	Owner
	Ownership Status*
	Approver*
	Owner Account
	Reassign Opportunity
	Channel Account Manager
	Additional Information
	Modified By
	Created By:
	Modified: Date External
	Created:
Partner Program Page Partner Sales Representative Layout	**Key Partner Program Information**
	Partner Program Name*
	Status*
	Begin Date*
	End Date*
	MDF Allowed*
	Special Pricing Allowed*
	Deal Registration Allowed*
	Program Details
	Description*
	Additional Information
	Created

Table 6. Page Section Layouts for Page Layouts for the Partner Sales Representative Role

Page Layout	Page Section Layout
	Owner Full Name
	Modified
Solution Page Partner Sales Representative Layout	**Solution Detail Information**
	Solution ID
	Title
	Product
	Status
	Published
	Solution Rating
	Created External
	Modified External
Service Request Page Partner Representative Layout	**Contact Information**
	Service Number
	Account
	Principal Partner Account
	Contact
	Work Phone #
	Email
	Service Detail Information
	Area
	Cause
	Type
	Source
	Modified External
	Created External
	SR Currency
	Priority
	Status
	Opened Time

Table 6. Page Section Layouts for Page Layouts for the Partner Sales Representative Role

Page Layout	Page Section Layout
	Closed Time
	Owner
	Owner Partner Account
	Reassign Owner
Accreditation Page Partner Sales Representative Layout	**Key Information Section**
	Name
	Type*
	Status
	Available From*
	Accreditation ID*
	Primary Product Category*
	Primary Product*
	Available Till*
	Accreditation Details Section
	Validity (Months)*
	Renewable*
	Website*
	Currency*
	Accreditation Fee*
	Payment Options*
	Contact Information Section
	Contact*
	Contact: First Name
	Contact: Last Name
	Contact: Account
	Contact: Email
	First Name*
	Last Name*
	Account*
	E-mail*

Table 6. Page Section Layouts for Page Layouts for the Partner Sales Representative Role

Page Layout	Page Section Layout
	Phone*
	Additional Information Section
	Created By
	Created: Date
	Owner
	Modified By
	Modified: Date
	Description*
Accreditation Request Page Partner Sales Representative Layout	**Key Request Information Section**
	Accreditation
	Objective
	Request Date
	Accreditation Number*
	Renewable*
	Partner
	Accreditation Date*
	Accreditation Status*
	Expiration Date*
	Additional Information Section
	Created By
	Created: Date
	Owner
	Modified By
	Modified: Date
	Description
Certification Page Partner Sales Representative Layout	**Key Information Section**
	Name
	Type*
	Status

Table 6. Page Section Layouts for Page Layouts for the Partner Sales Representative Role

Page Layout	Page Section Layout
	Available From*
	Certification ID*
	Primary Product Category*
	Primary Product*
	Available Till*
	Certification Details Section
	Validity (Months)*
	Renewable*
	Website*
	Currency*
	Certification Fee*
	Payment Options*
	Contact Information Section
	Contact*
	Contact: First Name
	Contact: Last Name
	Contact: Account
	Contact: Email
	First Name*
	Last Name*
	Account*
	E-mail*
	Phone*
	Additional Information Section
	Created By
	Created: Date
	Owner
	Modified By
	Modified: Date
	Description*

Table 6. Page Section Layouts for Page Layouts for the Partner Sales Representative Role

Page Layout	Page Section Layout
Certification Request Page Partner Sales Representative Layout	**Key Request Information Section**
	Certification
	Objective
	Request Date
	Certification Number*
	Renewable*
	Candidate
	Certification Date*
	Certification Status*
	Expiration Date*
	Additional Information Section
	Created By
	Created: Date
	Owner
	Modified By
	Modified: Date
	Description
Course Page Partner Sales Representative Layout	**Key Information Section**
	Name
	Type*
	Status
	Available From*
	Course ID*
	Primary Product Category*
	Primary Product*
	Available Till*
	Course Details Section
	Duration (Hours)*
	Course Length (Days)*

Table 6. Page Section Layouts for Page Layouts for the Partner Sales Representative Role

Page Layout	Page Section Layout
	Format*
	Medium*
	External Unique ID*
	Website*
	Hands-on Lab*
	Exam*
	Currency*
	Course Fee*
	Payment Options*
	Objective*
	Contact Information Section
	Contact*
	Contact: First Name
	Contact: Last Name
	Contact: Account
	Contact: Email
	First Name*
	Last Name*
	Account*
	E-mail*
	Phone*
	Additional Information Section
	Created By
	Created: Date
	Owner
	Modified By
	Modified: Date
	Description*
Course Enrollment Page Partner Sales Representative Layout	**Key Enrollment Information**
	Course

Table 6. Page Section Layouts for Page Layouts for the Partner Sales Representative Role

Page Layout	Page Section Layout
	Objective
	Enrollment Date
	Enrollment Status*
	Candidate
	Enrollment Number
	Completion Date
	Course Partner
	Available Section
	Created By
	Created: Date
	Owner
	Modified By
	Modified: Date
	Description
Exam Page Partner Sales Representative Layout	**Key Information Section**
	Name
	Type*
	Status
	Available From*
	Exam ID*
	Primary Product Category*
	Primary Product*
	Available Till*
	Examination Details Section
	Number of Questions*
	Time Allowed (Minutes)*
	Maximum Score*
	Passing Score*
	Validity (Months)*
	Website*

Table 6. Page Section Layouts for Page Layouts for the Partner Sales Representative Role

Page Layout	Page Section Layout
	Format*
	Medium*
	Grading Method*
	Currency*
	Exam Fee*
	Payment Options*
	Contact Information Section
	Contact*
	Contact: First Name
	Contact: Last Name
	Contact: Account
	Contact: Email
	First Name*
	Last Name*
	Account*
	E-mail*
	Phone*
	Additional Information Section
	Created By
	Created: Date
	Owner
	Modified By
	Modified: Date
	Description*
Exam Registration Page Partner Sales Representative Layout	**Key Information Section**
	Exam
	Objective
	Registration Date
	Registration Status*
	Exam Partner

Table 6. Page Section Layouts for Page Layouts for the Partner Sales Representative Role

Page Layout	Page Section Layout
	Score Expires On*
	Candidate
	Registration Number
	Completion Date
	Score Achieved
	Grade Achieved
	Exam Date

Access for the Partner Sales Representative Role

Typically, the partner sales representative role cannot update any information on the Accreditation, Certification, Course and Exam record types. Accreditations, certifications, courses, and exams are read-only for the partner sales representative role.

You can implement one of the following:

- Grant the partner sales representative role read-only access to the four record types.

  It is recommended that you use this approach because it is easier to enforce, especially if you will be adding more fields to the page layouts frequently.

- Make the fields read-only on the appropriate page layouts for the four record types.

  This approach is useful only if you want the partner sales representative role to be able to update some fields on some of the four record types.

Page Layouts for Related Information Sections for the Partner Sales Representative Role

Table 7 shows the related information sections that company administrators typically make available (that is, move to the Displayed Information section) in the page layouts for the partner sales representative role.

Table 7. Page Layouts for Related Information Sections for Sales Representative Page Role

Page Layout	Related Information Sections in Displayed Information Section
Deal Registration Page Partner Sales Representative Layout	Deal Registration Product Revenues
	Special Pricing Requests
	Deal Registration Teams

Table 7. Page Layouts for Related Information Sections for Sales Representative Page Role

Page Layout	Related Information Sections in Displayed Information Section
	Activities
Fund Request Page Partner Sales Representative Layout	Attachments
	Notes
	Open Activities
	Completed Activities
	Audit Trail
MDF Request Page Partner Sales Representative Layout	Activities
	Books
	MDF Request Teams
	MDF Request Attachments
	Audit Trail
Special Pricing Request Page Partner Sales Representative Layout	Special Pricing Products
	Activities
	Books
	Special Pricing Request Teams
	Special Pricing Request Attachments
	Special Pricing Request Attachment
Special Pricing Product Page Partner Sales Representative Layout	None
Application Page Partner Sales Representative Layout	Application Attachments
Fund Page Partner Layout	Fund Requests (if needed)
Fund Request Page Partner Sales Representative Layout	Attachments
	Notes
	Open Activities
	Closed Activities
	Audit Trail
Lead Page Partner Sales Representative Layout	Lead Partners
	Open Activities
	Completed Activities
	Attachments

Table 7. Page Layouts for Related Information Sections for Sales Representative Page Role

Page Layout	Related Information Sections in Displayed Information Section
	Lead Qualification Scripts
Opportunity Page Partner Sales Representative Layout	Opportunity Partners
	Leads
	Opportunity Team
	Contacts
	Product Revenues
	Notes
	Open Activities
	Completed Activities
	Opportunity Competitors
	Audit Trail
	Books
	Deal Registrations (if needed)
	Special Pricing Requests (if needed)
Solution Page Partner Sales Representative Layout	Attachments
Service Request Page Partner Representative Layout	Solutions
	Open Activities
	Completed Activities
	Notes
	Audit Trail
	Attachments
	Service Request Teams
	Books
Objective Page Partner Sales Rep	Activities
	Objective Teams
	Leads
	Deal Registrations
	Opportunities
	Special Pricing Requests
	MDF Requests

Table 7. Page Layouts for Related Information Sections for Sales Representative Page Role

Page Layout	Related Information Sections in Displayed Information Section
	Service Requests
Partner Program Page Partner Sales Representative Layout	Partner Program Attachment
Special Pricing Request	Special Pricing Request Attachment
Accreditation Page Partner Sales Representative Layout	Accreditation Attachments
	Accreditation Product Categories
	Accreditation Products
	Accreditation Solutions
	Related Accreditations
	Accreditation Certifications
	Accreditation Requests
Certification Page Partner Sales Representative Layout	Certification Attachments
	Certification Product Categories
	Certification Products
	Certification Solutions
	Related Certifications
	Certification Courses
	Certification Exams
	Accreditation Certifications
	Certification Requests
Course Page Partner Sales Representative Layout	Course Attachments
	Course Product Categories
	Course Products
	Course Solutions
	Course Partners
	Related Courses
	Course Exams
	Certification Courses
	Course Enrollments
Exam Page Partner Sales Representative Layout	Exam Attachments

Table 7. Page Layouts for Related Information Sections for Sales Representative Page Role

Page Layout	Related Information Sections in Displayed Information Section
	Exam Product Categories
	Exam Products
	Exam Solutions
	Exam Partners
	Related Exams
	Course Exams
	Certification Exams
	Exam Registrations
	Courses

Setting Up Access Profiles for Partner Roles

This task is a step in Roadmap for Configuring Oracle CRM On Demand for Partner Relationship Management on page 16.

You must set up two profiles for each partner role:

- **Default access profile.** This access profile sets the access levels for records not owned by the user or by the user's group.
- **Owner access profile.** This access profile sets the access levels for the records owned by the user, by the user's group, or by someone who reports to the user (if manager visibility is enabled).

Complete the steps in the following procedure for each required access profile.

To set up the default access and owner access profiles for a partner role

1. In Oracle CRM On Demand, click the Admin link, User Management and Access Controls, and then the Access Profiles view.
2. Click the Copy link on the appropriate profile, as follows:
   - If you are setting up a default access profile, click the Copy link on a default access profile that is similar to the one that you want to set up.
   - If you are setting up an owner access profile, click the Copy link on an owner access profile that is similar to the one that you want to set up.

   For information about which profiles you might copy for the new page layouts, see the following:

- For more information on typical access profiles for the channel manager role, see Access Profiles for the Channel Manager Role on page 75.
- For more information on typical access profiles for the partner sales representative role, see Access Profiles for the Partner Sales Representative Role on page 77.

3 In Step 1 of the Access Profile Wizard, enter a name for the access profile.

For example, enter Partner Sales Representative Default Access Profile or Partner Sales Representative Owner Access Profile.

4 Go to Step 2 (Specify Access Levels), and change the access settings for the top-level profile and the related information settings for the role, as necessary. For more information, see the following:

- For more information on typical access settings for the channel manager role, see Access Levels for the Channel Manager Role on page 76.
- For more information on typical access settings for the partner sales representative role, see Access Levels for the Partner Sales Representative Role on page 77.

5 Click Finish.

Access Profile Settings for the Channel Manager Role

This topic describes the access profile settings that are suggested for the channel manager role. It contains the following information:

- Access Profiles for the Channel Manager Role on page 75
- Access Levels for the Channel Manager Role on page 76
- Setting Up the Channel Manager Access Profile for Partner Campaigns and Partner Plans on page 76

Access Profiles for the Channel Manager Role

For the channel manager role, you create a copy of the access profiles used for the PRM administrator role.

Table 8 shows the names of the access profiles that PRM administrators typically configure for the channel manager role.

Table 8. Access Profiles for the Channel Manager Role

Name of PRM Administrator Access Profile	Name of New Access Profile for Channel Manager
PRM Administrator Default Access Profile	Channel Manager Default Access Profile
PRM Administrator Owner Access Profile	Channel Manager Owner Access Profile

Access Levels for the Channel Manager Role

Do not change any of the settings in the new channel manager access profiles unless your company has a requirement to change the settings.

Setting Up the Channel Manager Access Profile for Partner Campaigns and Partner Plans

If you want to use partner plans and partner campaigns, you must set up the following access profiles:

- Partner campaigns
- Partner plans

Complete the steps in the following procedure to set up the channel manager access profile for partner campaigns and partner plans.

To set up the channel manager access profile for partner campaigns and partner plans

1. In Oracle CRM On Demand, click the Admin link, User Management and Access Controls, and then Role Management view.
2. Click the Edit link for the PRM Administrator role.
3. On the Role Management Wizard, click the link for Record Type Access.
4. Select the three check boxes for Partner Plan and Partner Campaign.
5. Click Finish.
6. Click the Admin link, User Management and Access Controls, and then Access Profiles.
7. Click the Edit link for the Administrator Owner access profile, and then Specify Access Levels.
8. Scroll to the partner, and click the Related Information link.
9. In the Access Level field for Partner Plan and Partner Campaign, specify the access level as Full, and click Finish.
10. Click the Admin link, Application Customization, Partner, and then Partner Page Layout.
11. Click the Copy link for the Partner Page Standard Layout, in the Layout Name field type a name for the new layout, and then click Related Information.
12. Edit the Layout to include Partner Plan and Partner Campaign, and click Finish.
13. Click the Admin link, User Management and Access Controls, and then Role Management.
14. Click the Edit link for the Administrator Owner access profile, then Page Layout Assignment.
15. In the Partner Page Layout Name field, select the page layout you created previously, and click Finish.

Access Profile Settings for the Partner Sales Representative Role

This topic describes the access profile settings that are suggested for the partner sales representative role. It contains the following information:

- Access Profiles for the Partner Sales Representative Role on page 77
- Access Levels for the Partner Sales Representative Role on page 77

Access Profiles for the Partner Sales Representative Role

For the partner sales representative role, you create a copy of the access profiles used for the Field Sales Representative role. Table 9 shows the names of the access profiles that PRM administrators typically configure for the partner sales representative role.

Table 9. Access Profiles for the Partner Sales Representative Role

Name of Existing Access Profile for Field Sales Representative	Name of New Access Profile for Partner Sales Representative
Field Sales Representative Default Access Profile	Partner Sales Representative Default Access Profile
Field Sales Representative Owner Access Profile	Partner Sales Representative Owner Access Profile

Access Levels for the Partner Sales Representative Role

Table 10 shows the access levels for the top-level profile that PRM administrators typically configure for the partner sales representative role.

Table 10. Access Levels for Top-Level Profiles for the Partner Sales Representative Role

Record Type	Default Access	Owner Access
Activity	View	View
Books	Read-Only	Read-Only
Campaign	Read-Only	Read-Only
Contact	Read-Only	Read/Edit/Delete
Forecast	Read-Only	Read/Edit
Fund	Read-Only	Read-Only

Table 10. Access Levels for Top-Level Profiles for the Partner Sales Representative Role

Record Type	Default Access	Owner Access
Fund Request	Read-Only	Read/Edit/Delete
Deal Registration	Read-Only	Read/Edit/Delete
Deal Registration Product Revenue	Read-Only	Read/Edit/Delete
MDF Request	Read-Only	Read/Edit/Delete
Special Pricing Request	Read-Only	Read/Edit/Delete
Special Pricing Product	Read-Only	Read/Edit/Delete
Lead	Read/Edit	Read/Edit/Delete
Opportunity	Read/Edit	Read/Edit/Delete
Partner	Read-Only	Read-Only
Partner Program	Read-Only	Read-Only
Partner Program Membership	Read-Only	Read-Only
Service Request	Read-Only	Read-Edit
Solution	Read-Only	Read-Only
Objective	Read-Only	Read-Only
Accreditation	Read-Only	Read/Edit/Delete
Accreditation Attachment	Read-Only	Read-Only
Accreditation Certification	Read-Only	Read-Only
Accreditation Product	Read-Only	Read-Only
Accreditation Product Category	Read-Only	Read-Only
Accreditation Request	Read/Edit/Delete	Read/Edit/Delete
Accreditation Solution	Read-Only	Read-Only
Related Accreditation	Read-Only	Read-Only
Certification	Read-Only	Read/Edit/Delete
Certification Attachment	Read-Only	Read-Only
Certification Course	Read-Only	Read-Only
Certification Exam	Read-Only	Read-Only
Certification Product	Read-Only	Read-Only
Certification Product Category	Read-Only	Read-Only
Certification Request	Read/Edit/Delete	Read/Edit/Delete
Certification Solution	Read-Only	Read-Only
Related Certification	Read-Only	Read-Only

Table 10. Access Levels for Top-Level Profiles for the Partner Sales Representative Role

Record Type	Default Access	Owner Access
Course	Read-Only	Read/Edit/Delete
Course Attachment	Read-Only	Read-Only
Course Enrollment	Read/Edit/Delete	Read/Edit/Delete
Course Exam	Read-Only	Read-Only
Course Partner	Read-Only	Read-Only
Course Product	Read-Only	Read-Only
Course Product Category	Read-Only	Read-Only
Course Solution	Read-Only	Read-Only
Related Course	Read-Only	Read-Only
Exam	Read-Only	Read/Edit/Delete
Exam Attachment	Read-Only	Read-Only
Exam Partner	Read-Only	Read-Only
Exam Product	Read-Only	Read-Only
Exam Product Category	Read-Only	Read-Only
Exam Registration	Read/Edit/Delete	Read/Edit/Delete
Exam Solution	Read-Only	Read-Only
Related Exam	Read-Only	Read-Only

Setting the Access Levels for the Related Information Items for the Partner Sales Representative Role

Perform the following task to set the access levels for the related information items for the partner sales representative role.

Complete the steps in the following procedure to set the access levels for the related information items for the partner sales representative role.

To set the access levels for the related information items for the partner sales representative role

- Click the Related Information link next to a record type.

Table 11 shows the access levels for the related information items that PRM administrators typically configure for the partner sales representative role.

Table 11. Access Levels for Related Information Items for the Partner Sales Representative Role

Record Type	Related Information Items	Default Access	Owner Access
Accreditation	Books	No Access	Full
Accreditation	Accreditation Attachments	Read-Only	Full
Accreditation	Accreditation Certifications	Read-Only	Full
Accreditation	Accreditation Product Categories	Read-Only	Full
Accreditation	Accreditation Products	Read-Only	Full
Accreditation	Accreditation Requests	Inherit Primary	View
Accreditation	Accreditation Solutions	Read-Only	Full
Accreditation	Accreditation Teams	No Access	Full
Accreditation	Related Accreditations	Read-Only	Full
Certification	Books	No Access	Full
Certification	Accreditation Certifications	Read-Only	Full
Certification	Certification Attachments	Read-Only	Full
Certification	Certification Courses	Read-Only	Full
Certification	Certification Exams	Read-Only	Full
Certification	Certification Product Categories	Read-Only	Full
Certification	Certification Products	Read-Only	Full
Certification	Certification Requests	Inherit Primary	View
Certification	Certification Solutions	Read-Only	Full
Certification	Related Certifications	Read-Only	Full
Certification	Certification Teams	No Access	Full
Contact	Accreditations	Read-Only	Read-Only
Contact	Certification Requests	Inherit Primary	View

Table 11. Access Levels for Related Information Items for the Partner Sales Representative Role

Record Type	Related Information Items	Default Access	Owner Access
Contact	Certifications	Read-Only	Read-Only
Contact	Course Enrollments	Inherit Primary	View
Contact	Courses	Read-Only	Read-Only
Contact	Exam Registrations	Inherit Primary	View
Contact	Exams	Read-Only	Read-Only
Course	Books	No Access	Full
Course	Certification Courses	Read-Only	Full
Course	Course Attachments	Read-Only	Full
Course	Course Enrollments	Inherit Primary	View
Course	Course Exams	Read-Only	Full
Course	Course Partners	Read-Only	Full
Course	Course Product Categories	Read-Only	Full
Course	Course Products	Read-Only	Full
Course	Course Solutions	Read-Only	Full
Course	Course Teams	No Access	Full
Course	Related Courses	Read-Only	Full
Exam	Books	No Access	Full
Exam	Certification Exams	Read-Only	Full
Exam	Course Exams	Read-Only	Full
Exam	Courses	Read-Only	Read-Only
Exam	Exam Attachments	Read-Only	Full
Exam	Exam Partners	Read-Only	Full
Exam	Exam Product Categories	Read-Only	Full
Exam	Exam Products	Read-Only	Full
Exam	Exam Registrations	Inherit Primary	View
Exam	Exam Solutions	Read-Only	Full
Exam	Exam Teams	No Access	Full

Table 11. Access Levels for Related Information Items for the Partner Sales Representative Role

Record Type	Related Information Items	Default Access	Owner Access
Exam	Related Exams	Read-Only	Full
Fund	Activities	View	View
Fund	Attachments	No Access	No Access
Fund	Audit Trail	No Access	No Access
Fund	Books	No Access	No Access
Fund	Credits	No Access	No Access
Fund	Custom Objects (All)	No Access	No Access
Fund	Debits	No Access	No Access
Fund	Fund Request	No Access	No Access
Fund	Notes	No Access	No Access
Fund	Participants	No Access	No Access
Fund	Partner	No Access	No Access
Fund Request	Attachments	Full	Full
Fund Request	Audit Trail	Read Only	Read Only
Fund Request	Completed Activities	View	View
Fund Request	Custom Objects (All)	No Access	No Access
Fund Request	Notes	Full	Full
Fund Request	Open Activities	View	View
Fund	MDF Requests	No Access	No Access
Fund	Special Pricing Requests	No Access	No Access
MDF Request	Activities	View	View
MDF Request	Books	Read Only	Read Only
MDF Request	MDF Request Teams	Read Only	Full
MDF Request	Custom Objects (All)	No Access	No Access
MDF Request	MDF Request Attachment	Read Only	Full
MDF Request	Audit Trail	Read Only	Read Only
Deal Registration	Deal Registration Product Revenues	Read Only	Full
Deal Registration	Special Pricing Requests	View	Full
Deal Registration	Activities	View	View

Table 11. Access Levels for Related Information Items for the Partner Sales Representative Role

Record Type	Related Information Items	Default Access	Owner Access
Deal Registration	Custom Objects (All)	No Access	No Access
Deal Registration	Audit Trail	Read Only	Read Only
Special Pricing Request	Activities	View	Read Only
Special Pricing Request	Books	Read Only	Read Only
Special Pricing Request	Partner Special Pricing Request	No Access	No Access
Special Pricing Request	Special Pricing Products	Read Only	Full
Special Pricing Request	Special Pricing Request Teams	Read Only	Full
Special Pricing Request	Custom Objects (All)	No Access	No Access
Special Pricing Request	Special Pricing Request Attachment	Read Only	Full
Special Pricing Request	Audit Trail	Read Only	Read Only
Lead	Attachment	Full	Full
Lead	Books	No Access	No Access
Lead	Completed Activities	View	View
Lead	Lead Assessment	No Access	No Access
Lead	Open Activities	View	View
Lead	Partner	Full	Full
Opportunity	Deal Registrations	View	Full
Opportunity	Special Pricing Requests	View	View
Opportunity	Attachments	Full	Full
Opportunity	Audit Trail	Read Only	Read Only
Opportunity	Books	Read Only	Read Only
Opportunity	Completed Activities	View	View
Opportunity	Contacts	Full	Full
Opportunity	Custom Objects (All)	No Access	No Access
Opportunity	Leads	Full	Full
Opportunity	Notes	Full	Full
Opportunity	Open Activities	View	View
Opportunity	Opportunity Assessment	No Access	No Access

Table 11. Access Levels for Related Information Items for the Partner Sales Representative Role

Record Type	Related Information Items	Default Access	Owner Access
Opportunity	Opportunity Competitors	Full	Full
Opportunity	Opportunity Partners	Full	Full
Opportunity	Opportunity Team	Full	Full
Opportunity	Opportunity Revenues	Full	Full
Partner	Account	No Access	No Access
Partner	Accounts (For the originating partner, use Partner Account instead of Accounts.)	No Access	No Access
Partner	Addresses	No Access	No Access
Partner	Applications	No Access	No Access
Partner	Attachments	No Access	No Access
Partner	Books	No Access	No Access
Partner	Completed Activities	No Access	No Access
Partner	Contacts	No Access	No Access
Partner	Custom Objects 01	No Access	No Access
Partner	Custom Objects 02	No Access	No Access
Partner	Custom Objects 03	No Access	No Access
Partner	Deal Registrations (Principal Partner)	No Access	No Access
Partner	Deal Registrations (Owner Partner)	No Access	No Access
Partner	Deal Registrations (Originating Partner)	No Access	No Access
Partner	Fund	No Access	No Access
Partner	Fund Requests	No Access	No Access
Partner	Fund Requests (Owner Partner)	No Access	No Access
Partner	Fund requests (Principal Partner)	No Access	No Access
Partner	Lead	No Access	No Access
Partner	Leads (Originating Partner)	No Access	No Access

Table 11. Access Levels for Related Information Items for the Partner Sales Representative Role

Record Type	Related Information Items	Default Access	Owner Access
Partner	Leads (Owner partner)	No Access	No Access
Partner	MDF Requests	No Access	No Access
Partner	MDF Requests (Originating Partner)	No Access	No Access
Partner	MDF requests (Principal Partner)	No Access	No Access
Partner	Notes	No Access	No Access
Partner	Open Activities	No Access	No Access
Partner	Opportunities	No Access	No Access
Partner	Opportunities (Owner Partner)	No Access	No Access
Partner	Opportunities (Origination Partners)	No Access	No Access
Partner	Partner Organization Books	No Access	No Access
Partner	Partner Relationships	No Access	No Access
Partner	Partner Special Pricing Requests	No Access	No Access
Partner	Partner Team	No Access	No Access
Partner	Partner Types	No Access	No Access
Partner	Partners	No Access	No Access
Partner	Policies	No Access	No Access
Partner	Program Memberships	No Access	No Access
Partner	Special Pricing Requests	No Access	No Access
Partner	Special Pricing Requests (Owner Partner)	No Access	No Access
Partner	Special Pricing Requests (Principal partners)	No Access	No Access
Partner	Partner Campaign	No Access	No Access
Partner	Partner Plan	No Access	No Access
Partner	Accreditation Requests	Inherit Primary	View

Table 11. Access Levels for Related Information Items for the Partner Sales Representative Role

Record Type	Related Information Items	Default Access	Owner Access
Partner	Course Enrollments	Inherit Primary	View
Partner	Course Partners	Read-Only	Read-Only
Partner	Exam Partners	Read-Only	Read-Only
Partner	Exam Registrations	Inherit Primary	View
Partner Program Membership	Attachment	Read-Only	Read-Only
Program	Opportunity	No Access	No Access
Program	Books	No Access	No Access
Program	Program Membership	No Access	No Access
Program	Fund Requests	No Access	No Access
Program	MDF Requests	No Access	No Access
Program	Special Pricing Requests	No Access	No Access
Program	Deal Registrations	No Access	No Access
Program	Partner Program Attachment	No Access	No Access
Solution	Attachments	Full	Full
Solution	Custom Objects (All)	No Access	No Access
Solution	Related Solutions	Full	Full
Solution	Service Requests	Full	Full
Solution	Solution Product	View	View
Application	Activities	No Access	No Access
Application	Application Teams	No Access	No Access
Application	Books	No Access	No Access
Application	Application Attachment	No Access	No Access
Application	Audit Trail	No Access	No Access
Service Request	Attachment	Read Only	Full
Service Request	Audit Trail	Read Only	Read Only
Service Request	Books	Read Only	Full
Service Request	Completed Activities	Read Only	View
Service Request	Notes	Read Only	Full

Table 11. Access Levels for Related Information Items for the Partner Sales Representative Role

Record Type	Related Information Items	Default Access	Owner Access
Service Request	Open Activities	Read Only	View
Service Request	SR Assessment	Read Only	View
Service Request	Service Request Teams	Read Only	Full
Service Request	Solutions	View	View
Business Plan	Accreditation	No Access	No Access
Business Plan	Activities	No Access	No Access
Business Plan	Business Plan Teams	No Access	No Access
Business Plan	Business Plans	No Access	No Access
Business Plan	Objectives	No Access	No Access
Objective	Accreditation Requests	Read Only	Full
Objective	Accreditations	Read Only	View
Objective	Activities	Read Only	View
Objective	Certification Requests	Read Only	Full
Objective	Certifications	Read Only	View
Objective	Course Enrollments	Read Only	Full
Objective	Courses	Read Only	View
Objective	Deal Registrations	Read Only	View
Objective	Exam Registrations	Read Only	Full
Objective	Exams	Read Only	View
Objective	Leads	Read Only	View
Objective	MDF Requests	Read Only	View
Objective	Objective Teams	Read Only	Full
Objective	Objectives	Read Only	View
Objective	Opportunities	Read Only	View
Objective	Service Requests	Read Only	View
Objective	Special Pricing Requests	Read Only	View

Creating Partner Roles

This task is a step in Roadmap for Configuring Oracle CRM On Demand for Partner Relationship Management on page 16.

Complete the steps in the following procedure to create a partner role.

To create a partner role

1. In Oracle CRM On Demand, click Admin, User Management and Access Controls, and then Role Management view.
2. Click the Copy link on an existing role that is similar to the role that you want to create.

   For example, to create the channel manager role, copy the PRM Administrator role. To create the partner sales representative role, copy the Field Sales Representative role.

   The Role Management Wizard opens.
3. In Step 1 of the Role Management Wizard, enter the role name (for example, channel manager) and a description.
4. In Step 2 of the Role Management Wizard (Record Type Access) change the settings for the role, as necessary. For more information, see the following:
   - For more information on typical access settings for the channel manager role, see Record Type Access for the Channel Manager Role on page 89.
   - For more information on typical access settings for the partner sales representative role, see Record Type Access for the Partner Sales Representative Role on page 92.
5. In the Role Management Wizard, go to Step 3 (Access Profiles), and select the access profiles that you created earlier for the role.
6. In the Role Management Wizard, go to Step 4 (Privileges), and change the settings for the role, as necessary. For more information, see the following:
   - For more information on typical privilege settings for the channel manager role, see Privileges for the Channel Manager Role on page 90.
   - For more information on typical privilege settings for the partner sales representative role, see Privileges for the Partner Sales Representative Role on page 94.
7. In the wizard, go to Step 5 (Tab Access & Order), and change the settings for the role as needed.For more information, see the following:
   - For more information on typical tab settings for the channel manager role, see Tab Access and Order for the Channel Manager Role on page 90.
   - For more information on typical tab settings for the partner sales representative role, see Tab Access and Order Settings for the Partner Sales Representative Role on page 95.
8. In the wizard, go to Step 6 (Page Layout Assignment), and assign a page layout to each record type. For more information, see the following:
   - For more information on typical page layout assignments for the channel manager role, see Page Layouts Assigned to the Channel Manager Role on page 91.
   - For more information on typical page layout assignments for the partner sales representative role, see Page Layouts Assigned to the Partner Sales Representative Role on page 96.

9 In the wizard, go to Step 7 (Search Layout Assignment), and assign a search layout to each record type.

For information about setting up search layouts, see *Oracle CRM On Demand Online Help.*

10 In the wizard, go to Step 8 (Homepage Layout Assignment), and assign a home page layout for each record type.

For information about setting up layouts, see *Oracle CRM On Demand Online Help.*

11 Click Finish.

Access Profiles for the Partner Administrator Role

To create the partner administrator role, you create a copy of the access profiles used for the partner sales representative role. Table 12 shows the names of the access profiles that PRM administrators typically configure for the partner administrator role.

Table 12. Access Profile Names for the Partner Administrator Role

Access Profile for Partner Sales Representative Role	New Access Profile Name for Partner Administrator Role
Partner Sales Representative Default Access Profile	Partner Administrator Default Access profile
Partner Sales Representative Owner Access Profile	Partner Administrator Owner Access profile

Role Settings for the Channel Manager Role

This topic describes the typical role settings for the channel manager role. It contains the following:

Record Type Access for the Channel Manager Role

Do not change any of the settings in the record type access for the channel manager role unless your company has a requirement to change the settings.

Privileges for the Channel Manager Role

The channel manager role is copied from the PRM administrator role, and therefore the channel manager role initially has the same privileges as the PRM administrator role. For the channel manager role, company administrators typically change some of the privilege settings.

Table 13 shows the privilege settings that company administrators typically change for the channel manager role.

CAUTION: Unless it is a requirement for your company, do not change the settings for the other privileges for the channel manager role (copied from the PRM administrator role). If you do, you risk interrupting data processing within Oracle CRM On Demand.

Table 13. Privileges for the Channel Manager Role

Category	Privilege	Assign
Customization: Data	Customize Application - Manage Custom Object 01	Not Selected
Customization: Data	Customize Application - Manage Custom Object 02	Not Selected
Customization: Data	Customize Application - Manage Custom Object 03	Not Selected
Customization: Data	Customize Application - Manage Custom Object 04-10	Not Selected
Customization: Data	Customize Application - Manage Custom Object 11- 15	Not Selected
Customization: Layout	Customize Application - Manage Dynamic Layouts	Not Selected
Customization: Layout	Customize Application - Manage Homepage Customization	Not Selected
Customization	Customize Application	Not Selected
PRM	Convert Deal Registrations	Selected

Tab Access and Order for the Channel Manager Role

Do not change any of the settings in the tab access and order for the channel manager role (copied from the PRM administrator role) unless your company has a requirement to change the settings.

Page Layouts Assigned to the Channel Manager Role

Table 14 shows the page layouts that company administrators typically assign to the channel manager role.

Table 14. Page Layouts Assigned to the Channel Manager Role

Record Type	Page Layout
Fund Request	Fund Request Page Channel Manager Layout
Lead	Lead Page Channel Manager Layout
Opportunity	Opportunity Page Channel Manager Layout
Solution	Solution Page Channel Manager Layout
Deal Registration	Deal Registration Page Channel Manager Layout
Fund	Fund Page Channel Manager Layout
MDF Request	MDF Request Page Channel Manager Layout
Special Pricing Request	Special Pricing Request Page Channel Manager Layout
Special Pricing Product	Special Pricing Product Page Channel Manager Layout
Price List	Price List Page Channel Manager Layout
Price List Line Item	Price List Line Item Page Channel Manager Layout
Application	Application Page Channel Manager Layout
Partner	Partner Page Channel Manager Layout
Service Request	Service Request Page Channel Manager Layout
Business Plans	Business Plan Page Channel Manager Layout
Objective	Objective Page Channel Manager Layout
Accreditation	Accreditation Page Channel Manager Layout
Accreditation Request	Accreditation Request Page Channel Manager Layout
Certification	Certification Page Channel Manager Layout
Certification Request	Certification Request Page Channel Manager Layout
Course	Course Page Channel Manager Layout
Course Enrollment	Course Enrollment Page Channel Manager Layout
Exam	Exam Page Channel Manager Layout
Exam Registration	Exam Registration Page Channel Manager Layout

Role Settings for the Partner Sales Representative Role

This topic describes the typical role settings for the partner sales representative role. It includes the following:

- Record Type Access for the Partner Sales Representative Role on page 92
- Privileges for the Partner Sales Representative Role on page 94
- Tab Access and Order Settings for the Partner Sales Representative Role on page 95
- Page Layouts Assigned to the Partner Sales Representative Role on page 96

Record Type Access for the Partner Sales Representative Role

Table 15 shows the record type access for partner relationship management that company administrators typically configure for the partner sales representative role.

Table 15. Record Type Access for the Partner Sales Representative Role

Record Type	Has Access	Can Create	Can Read All Records
Account	Selected	Not selected	Not selected
Activity	Selected	Selected	Not selected
Assessment	Selected	Selected	Not selected
Asset	Selected	Not selected	Not selected
Books	Selected	Not selected	Not selected
Campaign	Selected	Not selected	Not selected
Contact	Selected	Selected	Not selected
Forecast	Selected	Selected	Not selected
Fund	Selected	Not selected	Not selected
Fund Request	Selected	Selected	Not selected
Deal Registration	Selected	Selected	Not selected
Deal Registration Produce Revenue	Selected	Selected	Not Selected
MDF Request	Selected	Selected	Not selected
Special Pricing Request	Selected	Selected	Not selected
Special Pricing Product	Selected	Selected	Not selected

Table 15. Record Type Access for the Partner Sales Representative Role

Record Type	Has Access	Can Create	Can Read All Records
Partner Special Pricing Request	Not selected	Not selected	Not selected
Household	Not selected	Not selected	Not selected
Lead	Selected	Selected	Not selected
Opportunity	Selected	Selected	Not selected
Partner	Selected	Not selected	Not selected
Partner Program	Selected	Not selected	Not selected
Partner Program Membership	Selected	Not selected	Not selected
Service Request	Selected	Selected	Not selected
Solution	Selected	Not selected	Selected
Applications	Not selected	Not selected	Not selected
Business Plan	Not selected	Not selected	Not selected
Objective	Selected	Selected	Not selected
Partner Campaigns	Not selected	Not selected	Not selected
Partner Plans	Not selected	Not selected	Not selected
Accreditation	Selected	Not selected	Not selected
Accreditation Attachment	Selected	Not selected	Not selected
Accreditation Certification	Selected	Not selected	Not selected
Accreditation Product	Selected	Not selected	Not selected
Accreditation Product Category	Selected	Not selected	Not selected
Accreditation Request	Selected	Selected	Not selected
Accreditation Solution	Selected	Not selected	Not selected
Certification	Selected	Not selected	Not selected
Certification Attachment	Selected	Not selected	Not selected
Certification Course	Selected	Not selected	Not selected
Certification Exam	Selected	Not selected	Not selected
Certification Product	Selected	Not selected	Not selected
Certification Product Category	Selected	Not selected	Not selected
Certification Request	Selected	Selected	Not selected

Table 15. Record Type Access for the Partner Sales Representative Role

Record Type	Has Access	Can Create	Can Read All Records
Certification Solution	Selected	Not selected	Not selected
Course	Selected	Not selected	Not selected
Course Attachment	Selected	Not selected	Not selected
Course Enrollment	Selected	Selected	Not selected
Course Exam	Selected	Not selected	Not selected
Course Partner	Selected	Not selected	Not selected
Course Product	Selected	Not selected	Not selected
Course Product Category	Selected	Not selected	Not selected
Course Solution	Selected	Not selected	Not selected
Exam	Selected	Not selected	Not selected
Exam Attachment	Selected	Not selected	Not selected
Exam Partner	Selected	Not selected	Not selected
Exam Product	Selected	Not selected	Not selected
Exam Product Category	Selected	Not selected	Not selected
Exam Registration	Selected	Selected	Not selected
Exam Solution	Selected	Not selected	Not selected
Related Accreditation	Selected	Not selected	Not selected
Related Certification	Selected	Not selected	Not selected
Related Course	Selected	Not selected	Not selected
Related Exam	Selected	Not selected	Not selected

Privileges for the Partner Sales Representative Role

Oracle CRM On Demand groups privileges together in categories. Table 16 shows the privileges settings that company administrators typically configure for the partner sales representative role.

Table 16. Privileges for the Partner Sales Representative Role

Category	Privilege	Assign
Analytics	Access Analytics Dashboards	Selected
Analytics	Access Analytics Reports	Selected
Analytics	Access Analytics Reports View Prebuilt Analysis	Selected
CRM:Marketing	Archive Leads	Selected

Table 16. Privileges for the Partner Sales Representative Role

Category	Privilege	Assign
CRM:Marketing	Convert Leads	Selected
CRM:Marketing	Partner Offerings	Selected
CRM:Marketing	Qualify Leads	Selected
CRM:Marketing	Reject Leads	Selected
CRM:Partners	Manage Fund Requests Access	Selected
CRM:Partners	Manage Fund Access	Selected
CRM	Share Calendar	Selected
Customization:Layout	Personalize Homepages	Selected
Data Management: Export	List Export	Selected
Data Management	Mass Update	Selected
Desktop/Mobile	Enable Offline Access	Selected
Desktop/Mobile	Enable PIM Sync Access	Selected
Desktop/Mobile	Outlook/Notes Email Integration	Selected
Integration:Widgets	Embed CRM On Demand Widgets	Selected
My Setup	Reset Personal Password	Selected
PRM	Manage PRM Books and WF	Selected
PRM	Convert Deal Registrations	Not Selected
PRM	Manage PRM Access	Not Selected

Tab Access and Order Settings for the Partner Sales Representative Role

Table 17 shows the tab access and order settings that company administrators typically configure for the partner sales representative role.

Table 17. Tab Access and Order for the Partner Sales Representative Role

Tab	Move to
Homepage	Selected Tabs
Calendar	Selected Tabs
Leads	Selected Tabs
Opportunity	Selected Tabs
Fund	Selected Tabs

Table 17. Tab Access and Order for the Partner Sales Representative Role

Tab	Move to
Solution	Selected Tabs
Partner Program	Selected Tabs
Partner	Not selected
Deal Registrations	Selected Tabs
SP Requests	Selected Tabs
MDF Requests	Selected Tabs
Applications	Selected Tabs
Service	Selected Tabs
Objective	Selected Tabs
Accreditations	Selected Tabs
Certifications	Selected Tabs
Courses	Selected Tabs
Exams	Selected Tabs

Page Layouts Assigned to the Partner Sales Representative Role

Table 18 shows the page layouts that company administrators typically assign to the partner sales representative role.

Table 18. Page Layouts Assigned to the Partner Sales Representative Role.

Record Type	Page Layout Name
Fund	Fund Page Partner Sales Representative Layout
Fund Request	Fund Request Page Partner Sales Representative Layout
Lead	Lead Page Partner Sales Representative Layout
Opportunity	Opportunity Page Partner Sales Representative Layout
Opportunity Product Revenue	Opportunity Product Revenue Page Standard Layout
Product	Product Page Standard Layout
Partner Program	Partner Program Page Partner Sales Representative Layout

Table 18. Page Layouts Assigned to the Partner Sales Representative Role.

Record Type	Page Layout Name
Solution	Solution Page Partner Sales Representative Page Layout
Task	Task Page Standard Layout
Deal Registration	Deal Registration Page Partner Sales Representative Layout
MDF Request	MDF Request Page Sales Representative Layout
Special Pricing Request	Special Pricing Request Page Sales Representative Layout
Special Pricing Product	Special Pricing Product Page Sales Representative Layout
Service Request	Service Request Page Partner Representative Layout
Objective	Objective Page Partner Sales Representative Layout
Accreditation	Accreditation Page Partner Sales Representative Layout
Accreditation Request	Accreditation Request Page Partner Sales Representative Layout
Certification	Certification Page Partner Sales Representative Layout
Certification Request	Certification Request Page Partner Sales Representative Layout
Course	Course Page Partner Sales Representative Layout
Course Enrollment	Course Enrollment Page Partner Sales Representative Layout
Exam	Exam Page Partner Sales Representative Layout
Exam Registration	Exam Registration Page Partner Sales Representative Layout

Privileges for the Partner Administrator Role

Table 19 shows the privileges settings that company administrators typically configure for the partner administrator role.

Table 19. Privileges for the Partner Administrator Role

Category	Privilege	Assign
PRM	Manage Users within the Partner Organization	Selected

Adding Partner Users

This task is a step in Roadmap for Configuring Oracle CRM On Demand for Partner Relationship Management on page 16.

A *partner user* is a user who has the Partner Organization field populated on their user record, and thus has access to the records for that partner organization. You can configure existing users to be partner users, and you can add new partner users.

Complete the following procedures to configure partner users. You must first configure the User Admin page layout, then set up a user as a partner user.

The following procedure describes how to configure the User Admin page layout.

To configure the User Admin page layout

1. In Oracle CRM On Demand, click Admin, and then click Application Customization.
2. In the Record Type Setup section, click User.
3. In the Page Layout Management section, click User Admin Page Layout.
4. In the User Admin Page Layout page, click the name link of the page layout that you want to change (that is, the page layout for the role given to users who can create and manage other users, typically the Administrator role).
5. Click the arrows to move the Partner Organization field to the section of the page where you want the field to appear.
6. Click Finish to save your changes.
7. Sign out of Oracle CRM On Demand and sign in again, to activate the changes.

The following procedure describes how to set up a user as a partner user.

To set up a user as a partner user

1. In Oracle CRM On Demand, click Admin.
2. In the User Management and Access Controls section, click User Management and Access Controls.
3. On the User Management and Access Controls page, click User Management.
4. On the User List page, do one of the following:
   - To add a new user, click New User.
   - To edit an existing user, click the Edit link beside the user name.
5. In the Partner Organization field on the User Edit page, click the lookup icon, and choose the partner organization with which the user is to be associated.
6. Save your changes.

About the Partner Self Administration Privilege

The Partner Self Administration privilege must be given to partner administrators. This privilege allows the user with the partner administrator role to edit and create users. The partner administrator will have access only to users within their own organization. All users who are added will be assigned automatically to the partner organization of the partner administrator.

Process of Configuring Books and Workflow Rules for Oracle CRM On Demand for Partner Relationship Management

This task is a step in Roadmap for Configuring Oracle CRM On Demand for Partner Relationship Management on page 16.

Your company can use books and workflow rules to manage user access to partner account records and their associated records. Typically, companies create one book for each partner organization, but it is also possible to use multiple books for one partner organization.

To configure books and workflow rules for Oracle CRM On Demand for Partner Relationship Management, perform the following tasks:

1. Creating the Partner Organization Book Type on page 99.
2. Creating Books for Partner Accounts on page 100
3. Configuring Workflow Rule Actions to Synchronize Partner Accounts on page 101

Creating the Partner Organization Book Type

This task is a step in Process of Configuring Books and Workflow Rules for Oracle CRM On Demand for Partner Relationship Management on page 99.

To support the use of books for Oracle CRM On Demand for Partner Relationship Management, the PRM administrator creates the partner organization book type. Complete the steps in the following procedure to create the partner organization book type.

To create the partner organization book type

1. In Oracle CRM On Demand, click Admin, and then click Application Customization.
2. In the Record Type Setup section, click Book.
3. In the Book Application Customization page, click Book Field Setup.
4. Click the Edit Picklist link for the Book Type field.
5. Enter the value, Partner Organization, in the picklist, and save your changes.

   For more information about editing picklist fields, see *Oracle CRM On Demand Online Help*.

Creating Books for Partner Accounts

This task is a step in Process of Configuring Books and Workflow Rules for Oracle CRM On Demand for Partner Relationship Management on page 99.

Once the PRM administrator has created the partner organization book type, the channel manager must create books for partner accounts. Complete the steps in the following procedure to create books for partner accounts.

To create books for partner accounts

1. Select the book type of the partner organization.
2. Select the appropriate partner in the Partner field.
3. Save the record.
4. Edit the Book record, and add the users who want access to the partner's organization.

   The users added are those people in the partner organization who always have access to the record to which the book is added.

The Ways in Which a Book Can be Associated with a Record

When a partner account is linked to another record, the linked record can also be associated with the partner organization's book. A book can be associated with a record in two ways:

- **By adding the book to the Book related information list on a record**. You can use numerous books to represent a grouping of partner users. The books do not all need to be defined as type: Partner Organization and they do not all need to have a partner defined. Books with the partner defined will be synchronized to records if the workflows described in this topic are used within the brand owner's implementation. If you only want one partner book synchronized based on the workflow rules you only have one book for each partner with the partner defined. Define the other books used for partner users without the specified partner.
- **Automatically, through a workflow rule**. You can create workflow rules with Oracle CRM On Demand for Partner Relationship Management specific actions to support the automatic association and dissociation of partner accounts and partner organization books with records. For example, you can use workflow rules to ensure that when a partner account is linked to an opportunity, the partner organization's book (or books) is also automatically added to the opportunity. This provides visibility to the opportunity record for all users of the partner organization (that is, the users who are associated with the partner organization's book) at one time. Or, you can create a workflow rule that automatically links a partner account to a record when a book associated with the partner account is associated with the record. The workflow rule also removes the partner organization's book from a record when the partner account is unlinked from the record. When a partner organization's book is removed from the record, the users of the partner organization no longer have visibility to the record by means of the book.

  NOTE: When you trigger the workflow actions for Oracle CRM On Demand for Partner Relationship Management, the partner book that was created automatically does not function properly. Only the manually created books function properly in workflows with Oracle CRM On Demand for Partner Relationship Management.

Configuring Workflow Rule Actions to Synchronize Partner Accounts

This task is a step in Process of Configuring Books and Workflow Rules for Oracle CRM On Demand for Partner Relationship Management on page 99.

Complete the following procedure to configure workflow rule actions to synchronize partner account information.

To configure a workflow rule action to synchronize partner account information

1. Create and save the workflow rule as follows:
   a. Type the workflow name.
   b. Select Active.
   c. Select the check box, Record Type of Opportunity.
   d. Select the check box, Trigger Event When New Record Saved.
   e. Click Save.

   For more information about working with workflow rules, see *Oracle CRM On Demand Online Help*.

About Workflow Rule Actions Specific to Managing Partner Accounts

The following workflow rule actions are specific to managing partner accounts:

- **Partner Book Sync.** Synchronizes the book associations when a partner account is a separate record not associated with the book. When the relationship of the account to that record is removed, the associated partner books are removed. *Associated partner books* are books where the partner is defined for the specific partner account. For example, when Partner Account A is linked to an opportunity record, all books defined as Partner A are also associated with the opportunity. If the association between the partner account and the opportunity is broken, then this workflow action removes the books for that partner account.
- **Book Partner Sync.** Links a partner account to a record when a book associated with the partner account (and Partner field is specified on the book) is associated with the record. This workflow action also removes the partner account relationship from a record when a book associated with the partner account is removed from the record.

  If multiple books are associated with that partner account, other books associated with the partner account are also synchronized with the record.
- **Owner Partner Account Sync.** When the record owner is a partner user and the partner organization is populated in the user record, the workflow synchronizes the record owner's partner account, and its associated books with the record. (Associated books are all books associated with that partner using the Partner field.) If the owner is changed, then all the books for the original partner are removed and that partner account is removed. An owner is automatically added to the team when the owner is added to the record. The user will also remain on the team if the user is removed from the Owner field.

Record Types for Which Oracle CRM On Demand for Partner Relationship Management Workflow Rule Actions Are Supported

The workflow rule actions for partner accounts are supported for the following record types:

- Account
- Lead
- Opportunity
- Fund
- Fund Credits
- Fund Debits
- Partner Program

Table 20 shows the actions that are available for each workflow trigger event.

NOTE: The partner relationship management specific actions are shown in bold.

Table 20. Partner Relationship Management Trigger Events and Actions

Trigger Event	Action
When a new record is saved	Create Email Notification
	Create Task
	Assign a Book
	Create Integration Event
	Partner Book Sync
	Book Partner Sync
	Owner Partner Account Sync
When a modified record is saved	Create Email Notification
	Create Task
	Assign a Book
	Create Integration Event
	Partner Book Sync
	Owner Partner Account Sync

Table 20. Partner Relationship Management Trigger Events and Actions

Trigger Event	Action
When a record is deleted	Create Email Notification Create Task Create Integration Event **Partner Book Sync** **Book Partner Sync**
Before a modified record is saved	Update Values **Partner Book Sync** **Owner Partner Account Sync**

Table 21 describes the configuration of workflow rule actions for partner relationship management.

Table 21. Workflow Actions for Partner Accounts

Workflow Rule Action	Configured for a Specific Record	Trigger Event and Outcome	Comments
Partner Book Sync	Child Record (For example, Account Partner)	**When new record is saved**. All books associated with the partner account are associated with the child record.	None
		Before record is deleted. All books associated with the partner account are removed from the child record.	None
		Before modified record is saved. If the partner account on the child record was changed, all books associated with the previous partner account are removed from the child record.	None
		When modified record is saved. If the partner account on the child record was changed, all books associated with the new partner account are associated with the child record.	None

Table 21. Workflow Actions for Partner Accounts

Workflow Rule Action	Configured for a Specific Record	Trigger Event and Outcome	Comments
Book Partner Sync	Child record for the book (For example, Account Book)	**When new record saved.** The book's partner account is associated with the child record for the book. All other books associated with the partner account are also associated with the child record for the book. **Before record is deleted**. The book's partner account is removed from the child record for the book.	Removing a book makes the partner account child record inactive, but it does not delete it. However, removing a partner account child or making it inactive, deletes the book.
Owner Partner Account Sync	Parent Record (Example: Lead)	**When new record saved.** The record owner's partner account is associated with the parent record. All books associated with the partner account are also associated with the parent record. **Before modified record saved.** If the owner of the parent record was changed from a partner user, the previous owner's partner account is removed from the parent record. All other books associated with the previous record owner's partner account are also removed from the parent record. (Using this workflow action in this instance is optional depending on your business rules.) **When modified record saved**. If the owner of the parent record was changed to a partner user, the new owner's partner account and associated books are associated with the parent record.	To ensure that the book information is synchronized, you must specify the workflow rules with the *When new record saved* trigger, and a rule with the *When modified record is saved* trigger. However, depending on your company's business rules, you may or may not choose to set up a rule using the *Before modified record saved* trigger, if your business rules dictate that changing an owner does not necessarily remove the previous owner's partner account and books from the record type.

Oracle CRM On Demand for Partner Relationship Management Workflow Actions

There are a number of workflow actions that are specific to Oracle CRM On Demand for Partner Relationship Management. Each type of these workflow actions is listed in the following tables. The workflows are listed in the sort order in the Workflow Rules List view.

When a partner book association with a record is changed, the workflow changes the partner account association with the record, as shown in Table 22.

Table 22. Workflow Record Types, Trigger Events, and Actions to Synchronize Books with Partner Account Records

Workflow Name	Workflow Menu Selection		
	Record Type	**Trigger Event**	**Action**
BPS_AcctBook_NewRecSav	Account Book	When new record is saved	Sync Book Partner
BPS_AcctBook_RecDel	Account Book	Before record is deleted	Sync Book Partner
BPS_FundBook_NewRecSav	Fund Book	When new record is saved	Sync Book Partner
BPS_FundBook_RecDel	Fund Book	Before record is deleted	Sync Book Partner
BPS_LeadBook_NewRecSav	Lead Book	When new record is saved	Sync Book Partner
BPS_LeadBook_RecDel	Lead Book	Before record is deleted	Sync Book Partner
BPS_OptyBook_NewRecSav	Opportunity Book	When new record is saved	Sync Book Partner
BPS_OptyBook_RecDel	Opportunity Book	Before record is deleted	Sync Book Partner
BPS_ProgBook_NewRecSav	Program Book	When new record is saved	Sync Book Partner
BPS_ProgBook_RecDel	Program Book	Before record is deleted	Sync Book Partner

When you change the association of a partner user who is the record owner, the workflow associates or disassociates the partner book and partner account with the record as shown in Table 23.

Table 23. Workflow Record Types, Trigger Events, and Actions to Synchronize Books with Owner Partner Account Records

Workflow Name	Workflow Menu Selection		
	Record Type	**Trigger Event**	**Action**
OPS_Acct_BeforeModRecSav	Account	Before modified record is saved	Sync Owner Partner
OPS_Acct_ModRecSav	Account	When modified record is saved	Sync Owner Partner
OPS_Acct_NewRecSav	Account	When new record is saved	Sync Owner Partner
OPS_Fund_BeforeModRecSav	Fund	Before modified record is saved	Sync Owner Partner
OPS_Fund_ModRecSav	Fund	When modified record is saved	Sync Owner Partner
OPS_Fund_NewRecSav	Fund	When new record is saved	Sync Owner Partner
OPS_Lead_BeforeModRecSav	Lead	Before modified record is saved	Sync Owner Partner
OPS_Lead_ModRecSav	Lead	When modified record is saved	Sync Owner Partner
OPS_Lead_NewRecSav	Lead	When new record is saved	Sync Owner Partner
OPS_Opty_BeforeModRecSav	Opportunity	Before modified record is saved	Sync Owner Partner
OPS_Opty_ModRecSav	Opportunity	When modified record is saved	Sync Owner Partner
OPS_Opty_NewRecSav	Opportunity	When new record is saved	Sync Owner Partner
OPS_Prog_BeforeModRecSav	Partner Program	Before modified record is saved	Sync Owner Partner
OPS_Prog_ModRecSav	Partner Program	When modified record is saved	Sync Owner Partner
OPS_Prog_NewRecSav	Partner Program	When new record is saved	Sync Owner Partner

When you change the association of a partner account association with a record, the workflow changes the partner book association as shown in Table 24.

Table 24. Workflow Record Types, Trigger Events, and Actions to Synchronize Books with Partner Account Records

Workflow Name	Workflow Menu Selection		
	Record Type	**Trigger Event**	**Action**
PBS_AcctPart_BeforeModRecSav	Account Partner	Before modified record is saved	Sync Partner Books
PBS_AcctPart_ModRecSav	Account Partner	When modified record is saved	Sync Partner Books
PBS_AcctPart_NewRecSav	Account Partner	When new record is saved	Sync Partner Books
PBS_AcctPart_RecDel	Account Partner	Before record is deleted	Sync Partner Books
PBS_FundMemb_BeforeModRecSav	Fund Membership	Before modified record is saved	Sync Partner Books
PBS_FundMemb_ModRecSav	Fund Membership	When modified record is saved	Sync Partner Books
PBS_FundMemb_NewRecSav	Fund Membership	When new record is saved	Sync Partner Books
PBS_FundMemb_RecDel	Fund Membership	Before record is deleted	Sync Partner Books
PBS_LeadPart_BeforeModRecSav	Lead Partner	Before modified record is saved	Sync Partner Books
PBS_LeadPart_ModRecSav	Lead Partner	When modified record is saved	Sync Partner Books
PBS_LeadPart_NewRecSav	Lead Partner	When new record is saved	Sync Partner Books
PBS_LeadPart_RecDel	Lead Partner	Before record is deleted	Sync Partner Books
PBS_OptyPart_BeforeModRecSav	Opportunity Partner	Before modified record is saved	Sync Partner Books
PBS_OptyPart_ModRecSav	Opportunity Partner	When modified record is saved	Sync Partner Books
PBS_OptyPart_NewRecSav	Opportunity Partner	When new record is saved	Sync Partner Books
PBS_OptyPart_RecDel	Opportunity Partner	Before record is deleted	Sync Partner Books

Table 24. Workflow Record Types, Trigger Events, and Actions to Synchronize Books with Partner Account Records

Workflow Name	Workflow Menu Selection		
PBS_ProgMemb_BeforeModRecSav	Program Membership	Before modified record is saved	Sync Partner Books
PBS_ProgMemb_ModRecSav	Program Membership	When modified record is saved	Sync Partner Books
PBS_ProgMemb_NewRecSav	Program Membership	When new record is saved	Sync Partner Books
PBS_ProgMemb_RecDel	Program Membership	Before record is deleted	Sync Partner Books

Example of Using a Workflow to Automatically Add a Partner Book to an Opportunity

The following is an Oracle CRM On Demand for Partner Relationship Management example of how to use a workflow to automatically add a Partner Book to an Opportunity when the Partner Organization is related to the Opportunity. This action gives users within the related Partner Book the same level of access to the Opportunity record as they have to their book.

1. In the Actions title bar on the Workflow Rule Detail page, click Menu, and then select the type of action that you want to be performed.

   The trigger event on the workflow rule determines what types of actions can be created on the rule. Workflow rule actions for partner accounts are described in Table 21.

2. In the Key Action Details section of the Workflow Action Edit page, enter a name for the action. If you want to enable the action, select the Active check box.
3. Save the action.
4. From the Actions Menu, select Sync Owner Partner.
5. Provide an appropriate name.
6. Select Active.
7. Click Save.

Viewing Workflow Results

You can use Oracle CRM On Demand to view the results of your workflows.

Requirements for Viewing the Results of Your Workflow

Before you can view the results of your workflow, you must have completed the tasks in the Process of Configuring Books and Workflow Rules for Oracle CRM On Demand for Partner Relationship Management.

- You must define a partner organization (Partner A) on the user record.
- You must create a book as a Partner Book, and define the partner as Partner A.
- For each record type, you must define a workflow rule and a workflow action for each Trigger Event and Action combination, and set both rule and action to Active.

Perform the following steps to view the results of your workflow.

To view workflow results

1. Select a record that the workflow will execute, and set up a partner relationship.

   The following table shows the relationship attributes that you must define when adding Oracle CRM On Demand for Partner Relationship Management related record types to the shown record types.

2. Save the relationship record that you selected in Step 1.

Record Types	Comments
Accounts when adding Account Partners	You must define the relationship by using the Relationship Type of PRM Covering Partner or PRM Covered Item.
Opportunity when adding Opportunity Partners	You must define the relationship by using the Relationship Type of PRM Covering Partner or PRM Covered Item.
Partner Programs when adding Program Memberships	When you add the Partner in the related item, you must select the Active flag. (The Active flag may need to be added to your related item page layouts).
Funds when adding Fund Memberships	When you add the Partner in the related item, you must select the Active flag. (The Active flag may need to be added to your related item page layouts).
Leads when adding Lead Partners	When you add the Partner in the related item, you must select the Active flag. (The Active flag may need to be added to your related item page layouts).

3. Save the record type.
4. View the Books related item on the record type.
5. Add the appropriate book defined for Partner A, as follows:
   a. If Books are not a related item that is visible to you, update the access profile so that Books are visible as a related item.

      For more information on working with access profiles, see Setting Up Access Profiles for Partner Roles on page 74.

   b. Sign out of Oracle CRM On Demand.
   c. Sign in to Oracle CRM On Demand.

d Verify that the workflow produced the results you wanted.

5 Managing Partner Relationships

This chapter provides examples of tasks and processes that channel managers and partner users perform to manage partner relationships. Your company can customize the tasks to meet its requirements. The chapter includes the following topics:

About Partner Account and Profiling Management

A *partner account* in partner relationship management is an account with the account type set to Partner, the Account Partner check box selected, and the Managed Partner flag set to Y. Partner accounts are records that track information about partners that have or will have users in Oracle CRM On Demand for Partner Relationship Management.

It is recommended that two separate records are created if the brand owner company works with another company both as a PRM partner and as an account to which the brand owner sells.

Working with partner records, you can define the business and the partnership profile information as well as the partnership information for the brand owner and the partner. Examples of partner profile information are company name, address, phone numbers, fax number, Web site, annual revenue, number of employees, market, industry, and a description of the business.

You can work with partner accounts through the Accounts tab or through the Partners tab, but some actions are possible in only one of the tabs. For more information about partner accounts, see Guidelines for Working with Partner Accounts on page 112.

Guidelines for Working with Partner Accounts

When you are setting up and working with partner accounts, consider the following guidelines:

- **Partner accounts are a subclass of accounts.** Because the partner record type is a subclass of the account record type, custom fields added to the account record type also appear in the partner record type. However, the reverse is not true; custom fields added to the partner record type are not available in the account record type.

  NOTE: When you edit a partner account from the Accounts tab, the Account Type field (set to Partner) is visible. When you edit a partner account from the Partners tab, the Account Type field is not visible, because the only account type that a partner account can have is Partner.

- **Create partner accounts using the Partner tab.** It is recommended that a PRM partner account is created and managed through the Partner tab.

  You can create PRM partner accounts through the Accounts tab, or through the Partners tab. If you create the account through the Partners tab, the account type is automatically set to Partner and the Managed Partner Flag is automatically set to Y. If you create an account through the Accounts tab and want to designate it as a partner account, you must set the Account Type field to Partner and the Managed Partner Flag to Y if you want the record to be treated as a PRM partner account in the partner record type. Designating an account as a partner account results in the account being visible through the Partners tab.

- **Changing the account type of a partner is restricted.** You cannot change the account type of a partner account to anything other than Partner while the partner organization status on the partner account is set to Active.

  To change the account type of a partner account, you must first set the partner organization status on the account to Inactive through the Partners tab. You can then change the account type value through the Accounts tab.

- **Deleting partner accounts with an active status is not allowed.** Oracle CRM On Demand does not allow you to delete an active partner account (that is, an account of the type Partner, where the partner organization status is set to Active) from the Accounts tab. This is because partner accounts can have opportunities and other records associated with them. Also, you cannot delete an account from the Partners tab, you can only make the partner account inactive.

  To delete a partner account, you must first set the partner organization status on the account to Inactive through the Partner tab. You can then delete the account through the Accounts tab.

  When you delete a partner account from the Accounts tab, Oracle CRM On Demand checks to make sure that the partner organization status on the account is set to Inactive, to prevent accidental deletion of an active partner record. For more information, see *Oracle CRM On Demand Online Help*.

- **Defining a partner hierarchy is allowed.** You can indicate partner hierarchies, such as a company that is a subsidiary of another company, by defining a parent-child relationship between accounts. The user of the parent account allows a hierarchy to be defined. For more information about partners, see *Oracle CRM On Demand Online Help*.

About Book Management

Using books to manage visibility to partner records ensures that one partner organization's critical information or records are secure from users in another partner organization unless one partner organization explicitly gives another access rights. Books also control visibility to records, so that all of the users who are associated with a partner organization's book have visibility to the partner organization record, and to all records that are linked to the partner organization's book. When a partner account is linked to another record, the linked record can also be associated with the partner organization's book.

Records can be associated with books either manually (by adding the book to the Book related information section on a record), or through workflow rules. For information about using workflow rules to associate books with records, see Process of Configuring Books and Workflow Rules for Oracle CRM On Demand for Partner Relationship Management on page 99.

The record types that books can be associated with are:

- Account
- Application
- Deal Registration
- MDF Requests
- SP Requests

- Partner
- Partner Program
- Opportunity
- Lead
- Fund

Table 25 describes some of the fields that are important when defining a book for a partner organization.

Table 25. Fields Supporting Book Management in Oracle CRM On Demand for Partner Relationship Management

Field	Description
Book Type	Used to define a partner organization's book. When you create partner organization books, you select the Partner Organization value, which is set up by the company administrator.
Partner	The partner organization associated with the book.
Partner Location	The Partner Location value is derived from the partner account record and is populated by default. The value is determined by the partner account relationship that is created when the Partner field is populated.

Example Process of Creating Partner Accounts

This topic provides one example of a process for creating partner accounts. Your company may follow a different process according to its business requirements.

To create a partner account, channel managers perform the following tasks:

1. Creating Partner Accounts (Channel Managers) on page 114
2. Creating Partner Organization Books (Channel Managers) on page 115

Creating Partner Accounts (Channel Managers)

This task is a step in Example Process of Creating Partner Accounts.

Complete the steps in the following procedure to create a partner account.

To create a partner account

1. Navigate to the Partners tab, and create a new partner account.
2. Set the status of the partner account to Active.

3 Save the partner account.

For more information about creating partner accounts, see *Oracle CRM On Demand Online Help*.

NOTE: Fields can be added to or removed from the Partner Detail page. If there are fields that you want to add to the Partner Detail page, contact your PRM administrator to add the fields.

What Happens When a Partner Is Created and the Partner Organization Status Is Set to Active?

When a PRM partner is created, the partner organization status set to Active, and the record is saved, a partner book is automatically created. As users are added as members of this PRM partner organization, the following actions occur:

- The users are automatically added to the book that was created.
- A partner record is placed in this book when a partner relationship is defined for the partner and Partner Access or Reciprocal Access is selected.

You can access this book in the book related item for the partner.

Creating Partner Organization Books (Channel Managers)

This task is a step in Example Process of Creating Partner Accounts.

Complete the steps in the following procedure to create a partner organization book.

To create a partner organization book

1 In Oracle CRM On Demand, click Admin.

2 In the User Management and Access Controls section of the Admin Homepage, click Book Management.

3 On the Book Hierarchy page, click New.

4 On the Book Edit page, enter the information for the book, including the fields shown in the following table, and then save your record.

The following table describes the settings for the fields on partner organization books.

Field	Description
Book Name	It is recommended that you define a naming convention such as the following: Partner Book - Company A - Location.
Book Type	Choose the partner organization value from the picklist.
Partner	Click the lookup icon, and select the partner organization with which the partner book will be associated.
Can Contain Data	Select the check box.

5. On the Book Details page, on the title bar of the Book Users section, click Add Users.
6. In the Book Users Edit page, choose the users whom you want to associate with the book.

   These users have visibility to the partner account record and to the records linked to the partner account.
7. Select a book user role (optional) and a book access profile for each user.

   For information about book user roles and book access profiles, see *Oracle CRM On Demand Online Help*.
8. Save the record.

   For more information about books, see *Oracle CRM On Demand Online Help*.

About Managing Partner Programs

Partner programs are designed by the brand owner company to help manage the life cycle of partners, from recruiting and segmenting partners to supporting funding programs, and to encourage the registration of deals. A *partner program* describes the requirements and benefits for partners when they are members of the partner program. Partner program records allow you to manage different types and levels of partner programs and to administer partner program memberships. For more information about the fields on the Partner Program page, see *Oracle CRM On Demand Online Help*.

Defining a Partner Program (Channel Manager)

Complete the steps in the following procedure to define a partner program.

To define a partner program

1. Navigate to the Partner Programs tab, and create a new partner program.
2. Define the Partner Program name and status, and the other fields, as applicable.
3. Save the Partner Program record.
4. In the Partner Program Details page, scroll down to the Program Membership section, and click New to add a partner to the partner program.
5. In the Partner Name field, click the lookup icon, and choose the name of the partner that you want to add as a member of the partner program.
6. Complete the other fields on the Program Membership Detail page, as required.
7. Save the record.

About Lead Management

A brand owner can assign a lead or group of leads to a partner organization or to a specific partner user, such as a partner sales representative. The partner can then accept or reject the ownership of the lead. After the lead is accepted, the partner can follow the same lead management processes that are defined for an internal field sales representative. For more information, see *Oracle CRM On Demand Online Help*.

Table 26 describes the fields that support lead management in Oracle CRM On Demand for Partner Relationship Management.

Table 26. Lead Management Fields for Oracle CRM On Demand for Partner Relationship Management

Field	Description
Ownership Status	Defines the current ownership status of the lead. The values include: ■ **Transfer to Partner.** The channel manager has transferred the lead to a partner. ■ **Accepted.** A partner selects Accepted to accept the lead. ■ **Declined.** A partner selects Declined to decline the lead.
Channel Manager	Read-only. This field contains the channel manager's name. The value is derived from the Channel Manager field on the partner record.
Owner Partner Account	Read-only. By default, this field displays the name of the partner company that the current owner of the lead works for. If the current owner is a brand-owner user, this field is blank by default.
Principal Partner Account	The partner company that is currently responsible for the lead. Typically, this field is the same as the Owner Partner Account, but might sometimes be different, for example, when the owner has out-sourced the follow-up work.
Originating Partner Account	The name of the partner company that uncovered the lead.

Example Process of Managing Leads

This topic provides one example of a process for managing leads. Your company may follow a different process according to its business requirements.

To manage leads, channel managers and partner users perform the following tasks:

1. Creating Leads for Partners (Channel Managers) on page 118
2. Taking Ownership of a Lead (Partner Users) on page 118

Creating Leads for Partners (Channel Managers)

This task is a step in Example Process of Managing Leads.

Complete the steps in the following procedure to create a lead.

To create a lead for a partner

1. Navigate to the Lead tab, and create a new lead.
2. Enter the lead's name and complete the other fields.
3. In the Owner Full Name field, click the lookup icon, and choose the new owner from a list of partner users.
4. Set the ownership status to Transfer to Partner.

   This status indicates that you have transferred this lead to the partner user.
5. Save the lead record.

   When you save the record, the Owner Account field and the Channel Manager field are populated automatically from the partner account record associated with the new owner of the lead.

Taking Ownership of a Lead (Partner Users)

This task is a step in Example Process of Managing Leads.

Complete the steps in the following procedure to take ownership of a lead.

To take ownership of a lead

1. Sign in to Oracle CRM On Demand, review the new lead in your list of leads, and determine if you want to own the lead.
2. Accept or reject the lead, as follows:
   - To accept the lead, set the ownership status to Accepted.
   - To decline the lead, set the ownership status to Declined.
3. Save the record.
4. Follow the standard lead management process.

   For more information, see *Oracle CRM On Demand Online Help*.

About Managing Deal Registration

Deal registration is a process by which a partner user registers a business opportunity with the brand owner in order to become eligible for benefits, such as exclusive rights to the opportunity, additional rebates, presales support, and so on. Typically, a partner user requests registration for an opportunity that he or she discovered. However, it is also possible that the partner might register an opportunity that was previously offered by the brand owner. Oracle CRM On Demand supports both possibilities by enabling a partner user to register new as well as existing opportunities.

Table 27 describes the fields that support deal registration in Oracle CRM On Demand for Partner Relationship Management.

Table 27. Deal Registration Fields for Oracle CRM On Demand for Partner Relationship Management

Field	Description
Name	The name of the deal registration.
Type	The type of deal registration.
Submission Status	Indicates the current submission status of the registration. The possible values are: Not Submitted, Submitted, and Recalled.
Expiration Date	The date after which the registration becomes invalid.
Special Price Reqd.	Indicates whether or not a special price might be required for one or more products.
ID	Unique identifier for the deal registration assigned by Oracle CRM On Demand.
Principal Partner	The partner company that is leading the effort for the registration.
Principal Partner Location	The location of the principal partner.
Partner Program	Partner Program in which the principal partner is enrolled.
Support Reqd.	Indicates whether or not any presales support is required for the deal.
Associated Opportunity	An existing opportunity for which the registration is being requested.
New Opportunity	Indicates whether or not the registration is for a new opportunity.
Currency	The type of currency on the deal.
Close Date	Date by which the deal is likely to close.
Product Interest	Broadly indicates the product area of the opportunity.
Next Step	The next logical step in the selling process of the deal.
Associated Customer	The customer associated with the deal. The customer must be an existing customer.
New Customer	Indicates whether or not the customer on the registration is a new customer.
Company Name	Name of the customer company.
Country	The country where the customer company is located.
Address 1	First line of street address of the customer company.
Address 2	Second line of the street address of the customer company.
City	City where the customer company is located.
Postal Code	Postal code of the customer company address.

Table 27. Deal Registration Fields for Oracle CRM On Demand for Partner Relationship Management

Field	Description
Associated Contact	Contact associated with the deal. The contact must be a contact already present in Oracle CRM On Demand.
New Contact	Indicates whether or not the contact is new to Oracle CRM On Demand.
Mr./Ms.	Salutation of the contact.
First Name	First name of the contact.
Middle Name	Middle name of the contact.
Last Name	Last name of the contact.
Job Title	Job title of the contact.
Email	Email address of the contact.
Telephone #	Telephone number of the contact.
Cell Phone	Mobile telephone number of the contact.
Fax	Fax number of the contact.
Approval Status	Indicates the current approval status for the deal registration.
Current Approver	Name of the approver who must approve the registration next.
Final Approver	Name of the person who granted final approval for the deal registration.
Submitted Date	The date and time when the registration was most recently submitted for approval.
Approved Date	The date and time when the registration received final approval.
Reject Reason	Indicates why the registration was returned or rejected.
Owner	Current owner of the registration.
Owner Partner Account	The partner company associated with the current owner. If the current owner is a brand owner user, this field is blank.
Originating Partner Account	Partner company that initially discovered or referred the deal.

Example Process of Managing Deal Registration

This topic provides one example of a process for managing deal registration. Your company may follow a different process according to its business requirements.

To manage deal registration, channel managers and partner users perform the following tasks:

1 Creating and Submitting Deal Registrations (Partner Users) on page 121

2 Associating Deal Registration with an Opportunity (Channel Manager) on page 121

3 Approving, Rejecting, or Returning Deal Registrations (Channel Managers) on page 122

Creating and Submitting Deal Registrations (Partner Users)

This task is a step in Example Process of Managing Deal Registration.

Complete the steps in the following procedure to create and submit a deal registration.

To create a deal registration

1 Navigate to the Deal Registrations page, and create a new deal registration.

2 Specify the details for the deal registration as follows:

   a Specify the name for the registration and other details, such as the expiration date and so on.

   b If the registration is for an existing opportunity, fill out the Associated Opportunity field as appropriate. Otherwise, if the registration is for a new opportunity, select the New Opportunity check box, and specify the additional details, such as Deal Size, Close Date, and so on.

   c If the registration is for an existing customer, specify the Associated Customer field. If the deal is for a new customer, select the New Customer check box, and specify the additional details about the new customer.

   d Perform Step a through Step c for Contact records as well.

   e If you want to assign the ownership of the deal registration to a different user, specify the user in the Owner field.

   f Save the record.

3 If you know the likely products for the deal, specify each product as a line item on the registration. Provide as much information as possible, including the price, quantity, and so on.

To submit a deal registration

1 Update the Submission Status field from Not Submitted to Submitted.

2 Save the record.

Associating Deal Registration with an Opportunity (Channel Manager)

When creating a new deal registration, it might or might not be associated with an opportunity. In most cases, the partner user has a new opportunity in mind when creating a deal registration and thus does not associate it with an existing opportunity. However, a deal registration cannot be approved unless it is associated with an opportunity. Thus, associating a deal registration with an opportunity is an important activity, usually performed by a brand owner user. The user can do it manually by populating the Associated Opportunity field or automatically by converting the deal registration to an opportunity.

This task is a step in Example Process of Managing Deal Registration.

Complete the steps in the following procedure to associate a deal registration with an opportunity.

To manually associate a deal registration with an opportunity

1. Select a deal registration that has the appropriate approval status, for example, Pending Approval.
2. Populate the Associated Opportunity field with the appropriate opportunity.
3. Save the record.

To automatically associate a deal registration with an opportunity

1. Select a deal registration that has the appropriate approval status, for example, Pending Approval.

   If your role has the privilege, PRM: Convert Deal Registration, you see a button labeled, Convert to Opportunity, on the Deal Registration Details page.

2. Click Convert to Opportunity.

   The Deal Registration Conversion page is displayed. Some fields are prepopulated with the values from the deal registration.

3. Modify the default values, as appropriate, and click Save.

   If the conversion is successful, a new opportunity is created and automatically associated with the deal registration. The Associated Opportunity field on the registration is populated with the newly created opportunity.

Approving, Rejecting, or Returning Deal Registrations (Channel Managers)

This task is a step in Example Process of Managing Deal Registration.

Complete the steps in the following procedure to approve, reject, or return a deal registration.

To approve or reject a deal registration

1. Navigate to the deal registration home page. Drill down on the list named, Deal Registrations Waiting for My Approval.

   A list of all deal registrations for which you are the current approver. appears.

2. Review the deal registrations in the list, and click the Edit link for the deal registration that you want to review and change.

   As part of your review of the deal registration for approval, It is recommended that you determine if the business opportunity specified on the deal registration already exists as an opportunity in Oracle CRM On Demand.

3. Determine if a matching opportunity exists, then do one of the following:

   - If a matching opportunity exists, associate it with the deal registration by updating the Associated Opportunity field in Oracle CRM On Demand.

- If no matching opportunity exists, convert the deal registration to an opportunity before giving it approval.

  For more information on converting a deal registration to an opportunity, see Associating Deal Registration with an Opportunity (Channel Manager) on page 121.

4 Determine what the approval status on the deal registration should be, and update the Approval Status field. The options are:

- **Approved.** Use this status to indicate that the deal registration is approved, if you have the final approval authority.
- **Pending Approval.** Use this status to indicate that you approve the deal registration, but another person in the approval hierarchy must make the final approval.
- **Returned.** Use this status to return the deal registration to the partner user because additional information is needed. Optionally, you might also specify why you are returning the registration by typing the appropriate reason in the Reject Reason field.
- **Rejected.** Use this status to reject the deal registration. Specify the reason for rejection in the Reject Reason field.

5 If you set the approval status to Pending Approval in the Approver field, choose the name of the brand owner user who must review this deal registration.

Deal Registration in Earlier Releases

Before Release 17, Oracle CRM On Demand for Partner Relationship Management supported deal registrations using opportunities. A partner user registered an opportunity by using the Registration Status field available on the opportunity record, which is specific to Oracle CRM On Demand for Partner Relationship Management.

To maintain backward compatibility, Oracle CRM On Demand for Partner Relationship Management continues to support this approach; that is, you can track and route a deal registration for approval by updating the Registration Status field on an opportunity record. However, this approach has the following limitations:

- Only opportunities that existed prior to upgrading Oracle CRM On Demand for Partner Relationship Management to Release 17 can be registered
- You can only have one registration for each opportunity
- Separate revenue line items are not available with the deal registration
- Limited analytics information is available.
- The deal registration cannot be associated with other objects, including custom objects.

Because of the preceding limitations, it is recommended that you track and maintain deal registrations using Release 17 and later. However, if you have a strong business need to continue using the previous approach to deal registrations, you can do so. However, it is recommended that you do not make both approaches available to the same set of users.

Table 28 describes the fields on the opportunity record that support deal registrations with Oracle CRM On Demand for Partner Relationship Management.

Table 28. Deal Registration Fields on the Opportunity Record

Field	Description
Program Name	The partner program with which the opportunity is associated.
Registration Status	A status field used by the partner to indicate the status of the deal registration. The values are as follows: Submitted, Expired, Registered and Recalled.
Ownership Status	Used to define the current status of the ownership of the opportunity. The values include: ■ **Transfer to Partner.** This value indicates that the channel manager has transferred the opportunity to a partner. ■ **Accepted.** The partner selects this value to accept the opportunity. ■ **Declined.** The partner selects this value to decline the opportunity.
Approver	The next approver for the deal registration. The next approver must be an employee at the brand owner company.
Approval Status	The values include: Pending Approval, Approved, Returned, and Rejected. Only the channel manager can edit this field. Partner users cannot edit this field. After the status is set to Approved, the registration status changes to Registered.
Channel Manager	This field includes the channel manager's name, and the value is derived from the Channel Manager field on the partner record.

Process of Registering a Deal

NOTE: You can customize this process to suit your business requirements.

The following are the steps involved in a typical deal registration process before Release 17:

1. The partner navigates to the Opportunity page, and completes the following tasks:
   a. Adds a new opportunity record.
   b. Enters the opportunity name (Opportunity A) and then completes other applicable fields.
   c. Selects an Owner Full Name and then selects the appropriate Partner User.
   d. Saves the opportunity record.

      After the record is saved, the Owner Account and the Channel Manager fields are populated.
   e. The partner works on the opportunity.

      For more information, see *Oracle CRM On Demand Online Help*.

- When the partner user is ready to register the opportunity for exclusive rights, the user sets the Registration Status to Submitted.

2 The channel manager signs in to Oracle CRM On Demand and completes the following tasks:

   a The channel manager creates an opportunity list, with the following list criteria:

      - Opportunities with the registration status of Submitted.
      - The Channel Manager value is set to the appropriate Channel Manager.
      - The list is named, *Deal Registrations Submitted for My Approval.*

   b The channel manager reviews the Deal Registrations Submitted for My Approval list and edits Opportunity A.

   c The channel manager reviews the deal registrations.

   d The channel manager determines if there are duplicate opportunities in Oracle CRM On Demand registered by others or owned by sales representatives within the company.

   e The channel manager determines the approval status, and updates the field. The options are:

      - **Approved.** The channel manager has the final approval authority and is approving the deal registration.
      - **Returned.** The channel manager is returning the deal registration to the partner for additional information, which is noted on the record.
      - **Rejected.** The channel manager has rejected the registration. It will not be approved.
      - **Pending Approval.** The channel manager does not have the final approval authority. The channel manager approves the deal registration, but another person in the approval hierarchy must make the final approval decision.

   The Approver field is updated with the brand owner user who must review this deal registration.

NOTE: The brand owner user entered in the approver field must be on the sales team or included as part of an approver book. If approver books are used, the book must be defined using book management processes and the approver book must be added by means of a workflow to all submitted opportunities.

3 After approval is received, the opportunity management process continues. For more information about managing opportunities, see *Oracle CRM On Demand Online Help*.

About Fund Management

The creation, approval, and administration of Market Development Funds (MDF) and Special Pricing Authorization (SPA) programs are supported using funds and fund request records. Funds and fund request records support financial information that can simplify the MDF and SPA management process, including information, such as fund establishment, fund administration, and managing requests, approvals, and claims. Funds can be set up to support MDF or SPA processes by specifying an appropriate fund type.

Managing Funds (Channel Managers)

This topic provides one example of a procedure for managing funds. Your company may follow a different procedure according to its business requirements.

Complete the steps in the following procedure to manage a fund.

To manage a fund

1. Navigate to the Fund page, and create a new fund.
2. Complete the required fields.
3. In the Type field, choose a value. The options are as follows:
   - MDF for a Market Development Fund
   - SPA for a fund that supports Special Pricing Authorizations
4. Save the record.
5. In the Fund Detail page, navigate to Fund Partners, and add a new member to the fund. Fund members are partner accounts that have visibility to the fund.
6. Save the record.

   For more information about managing funds, see *Oracle CRM On Demand Online Help.*

About Fund Request Management

Fund requests are used to support MDF requests and SPA requests. MDF requests can be made so that a partner can have access to market development funds. SPA requests are requests from partners for price adjustments that are submitted for approval. Oracle CRM On Demand for Partner Relationship Management allows brand owners to approve or reject each request. Within the fund request, the relationship to an opportunity can be defined, if applicable. This definition allows a brand owner to review and understand the opportunity that the fund request supports.

Table 29 describes the fields that support the fund request requirements for Oracle CRM On Demand for Partner Relationship Management.

Table 29. Fields Supporting Fund Requests in Oracle CRM On Demand for Partner Relationship Management

Field	Description
Fund	The fund associated with the fund request.
Type	Defines the type of request. The options are: ■ MDF (Market Development Fund) ■ SPA (Special Pricing Authorization)
Opportunity	The opportunity that the fund request is associated with.

Table 29. Fields Supporting Fund Requests in Oracle CRM On Demand for Partner Relationship Management

Field	Description
Opportunity Account	The account associated with the created opportunity.
Begin Date	The start date on which the preapproval is valid.
End Date	The date when the preapproval is no longer valid.
Owner Account	Read-only. The value is automatically populated after the record is saved. The field is populated with the record owner’s partner organization as defined on the user record.
Channel Manager	Read only. This field is populated with the channel manager's name derived from the channel manager field on the partner record.
Approver	The next approver for fund requests. The next approver must be an employee of the brand owner company.

Managing Fund Requests (Partner Users)

This topic provides one example of a procedure for managing fund requests. Your company may follow a different process according to its business requirements.

Complete the steps in the following procedure to manage a fund request.

To manage a fund request

1. Navigate to the Fund Request page, and create a new fund request.
2. Specify the details for the fund request, as follows:
   a. Enter the Fund Request Name, and complete other required fields.
   b. Select the fund to which the fund request is related.
   c. Specify the type of fund (SPA or MDF).
   d. Enter the requested amount in the Pre-Approval Req field.
   e. If you want to assign ownership of the fund request to another user, choose the appropriate partner user in the Owner field.
3. Save the record.
4. When you are ready to submit the request, change the value in the Status field to Pre-Approval Submitted, and save the record.

About Fund Request Claims Management

Using fund request claims, brand owners can automate the claims process. The claim can be submitted for the fund request that has been preapproved, allowing for a direct correlation between the resources that were requested and the payments made to the partner.

Example Process of Managing Fund Request Claims

This topic provides one example of a process for managing fund requests. Your company may follow a different process according to its business requirements.

To manage fund requests, channel managers and partner users perform the following tasks:

1. Submitting Fund Request Claims (Partner Users) on page 128
2. Approving or Rejecting Fund Request Claims (Channel Managers) on page 128

Submitting Fund Request Claims (Partner Users)

This task is a step in Example Process of Managing Fund Request Claims.

Complete the steps in the following procedure to submit a fund request claim.

To submit a fund request claim

1. Navigate to the Fund Request page, and click the Edit link for the fund request for which you want to submit a claim.
2. Enter a value in the Claim Req field to indicate the amount of money you are requesting.
3. Set the value in the Status field to Claim Submitted.
4. Save the record.

Approving or Rejecting Fund Request Claims (Channel Managers)

This task is a step in Example Process of Managing Fund Request Claims.

Complete the steps in the following procedure to approve or reject a fund request claim.

To approve or reject a fund request claim

1. Create a fund request list named, Claims Submitted for Approval, with the criterion defined as fund requests with the status of Claim Submitted.
2. Review the submitted claim.
3. Determine what amount, if any, to approve for the fund request, and edit the fund request as follows:

- If the fund request is approved, then do the following:
  a. Enter the approved amount in the Amount Approved field.
  b. Enter the date of the decision in the Claim Decision Date field.
  c. Set the Status field to Claim Approved.
- If the fund request is not approved, set the Status field to Claim Denied.

4. Save the record.

After the fund request is approved, the fund management process continues. For more information, see *Oracle CRM On Demand Online Help.*

About MDF Request Management

MDF requests can be made so that a partner can have access to market development funds (MDF) and promote the brand owner's products in certain geographical areas or promote the brand. Oracle CRM On Demand for Partner Relationship Management allows brand owners to approve or reject an MDF request.

Table 30 describes the fields that support MDF requests for Oracle CRM On Demand for Partner Relationship Management.

Table 30. Fields Supporting Oracle CRM On Demand for Partner Relationship Management MDF Requests

Field	Description
Request Name	The unique name of the MDF request.
Principal Partner Account	The partner company that is leading the effort on the MDF request.
Fund	The name of the fund associated with the MDF request.
Due Date	The date by which you must have the MDF request approved.
Expiration Date	The date on which the MDF request is no longer valid.
Start Date	The date and time the marketing activity starts.
End Date	The date and time the marketing activity ends.
Approver	The name of the current approver.
Approval Status	Indicates the current approval status of the MDF request. Status values are: Pending Approval, Approved, Returned, Rejected, Expired, and Cancelled.
Owner	The name of the user who currently owns the MDF Request record.
Owner Partner Account	The partner account for which the owner works.

Managing MDF Requests (Partner Users)

This topic provides one example of a procedure for managing MDF requests. Your company may follow a different process according to its business requirements.

Complete the steps in the following procedure to manage a MDF request.

To manage an MDF request

1 Navigate to the MDF Request page, and create an MDF request.

2 Specify the details for the MDF request, as follows:

   a Enter the request name, and complete the other required fields.

   b Select the MDF fund to which the request is related.

   c Enter the start and end dates and time for the marketing activity.

   d Enter the requested amount in the Pre-Approval Req field.

   e Provide additional details and the return on investment (ROI) justification for the event.

   f If you want to assign ownership of the MDF request to another user, choose the appropriate partner user in the Owner field.

3 Save the record.

4 When you are ready to submit the request, change the value of the Submission Status field to Submitted, and save the record.

About MDF Claims Management

Using MDF claims, brand owners can automate the claims process. The claim can be submitted on the MDF request, regardless whether it has been preapproved or not. Preapprovals are optional for MDF claims.

Example Process of Managing MDF Claims

This topic provides one example of a process for managing MDF claims. Your company may follow a different process according to its business requirements.

To manage fund requests, channel managers and partner users perform the following tasks:

1 Submitting MDF Claims (Partner Users)

2 Approving or Rejecting MDF Claims (Channel Managers)

Submitting MDF Claims (Partner Users)

This task is a step in Example Process of Managing MDF Claims.

Complete the steps in the following procedure to submit an MDF request claim.

To submit an MDF request claim

1. Navigate to the MDF Request page, and click the Edit link for the MDF request for which you want to submit a claim.
2. Enter a value in the Total Claim Amount Requested field to indicate the amount of money you are requesting.
3. Set the value in the Claim Status field to Claim Submitted.
4. Save the record.

Approving or Rejecting MDF Claims (Channel Managers)

This task is a step in Example Process of Managing MDF Claims.

Complete the steps in the following procedure to approve or reject an MDF request claim.

To approve or reject an MDF request claim

1. Navigate to the MDF request list named, MDF Requests Pending My Approval.
2. Review the submitted claim with the claim status of Claim Submitted.
3. Determine what amount, if any, to approve for the MDF request, and edit the MDF request as follows:
   - If the MDF request is approved, do the following:
   a. Enter the approved amount in the Total Claim Amount Approved field.
   b. Enter the date of the decision in the Claim Decision Date field.
   c. Set the Claim Status field to Claim Approved.
4. Save the record.

   After the MDF request claim is approved, the fund management process continues. For more information, see *Oracle CRM On Demand Online Help*.

About Special Pricing Request Management

Special pricing requests are requests for price adjustments that partners submit for approval. A partner user can add multiple products to the special pricing request and indicate the requested cost for each one of them. A partner user can provide additional information that justifies the requested discount.

Oracle CRM On Demand for Partner Relationship Management allows brand owners to approve or reject each request. Within the special pricing request, the relationship to an opportunity can be defined, if applicable. This definition allows a brand owner to review the opportunity for which the special pricing request has been created.

Table 31 shows the fields that support special pricing requests in Oracle CRM On Demand for Partner Relationship Management.

Table 31. Fields Supporting Special Pricing Requests in Oracle CRM On Demand for Partner Relationship Management

Field	Description
Request Name	The unique name of the special pricing request.
Principal Partner Account	The partner company that is leading the effort on the special pricing request.
Fund	The name of the fund associated with the special pricing request.
Due Date	The date by which you must have the special pricing request approved.
Expiration Date	The date on which the special pricing request is no longer valid.
Deal Registration	The deal registration for which the request is related.
Partner Program	The partner program with which the special pricing request is associated.
Start Date	The date and time when the marketing activity starts.
End Date	The date and time when the marketing activity ends.
Approver	The name of the current approver.
Owner	The name of the user who currently owns the MDF Request record.
Owner Partner Account	This is the partner account for which the owner works.

Managing Special Pricing Requests (Partner Users)

This topic provides one example of a procedure for managing special pricing requests. Your company may follow a different process according to its business requirements.

Complete the steps in the following procedure to manage a special pricing request.

To manage a special pricing request

1. Navigate to the SP Requests page, and create a special pricing request.
2. Specify the details for the special pricing request, as follows:

a. Enter the request name, and complete other required fields.
b. Add the number of products to the special pricing request.
c. Enter the requested cost for each product in the Requested Cost field.
d. Provide additional information (competitive information, and so on) that would justify the price reduction.
e. If you want to assign ownership of the special pricing request to another user, choose the appropriate partner user in the Owner field.

3. Save the record.
4. When you are ready to submit the request, change the value of the Submission Status field to Submitted, and save the record.

About Special Pricing Claims Management

Brand owners can automate the claims process, using special pricing claims. A claim can be submitted on the preapproved special pricing request. This type of claim allows for a direct correlation between the resources that were requested and the payments that were made to the partner.

Example Process of Managing Special Pricing Claims

This topic provides one example of a process for managing special pricing claims. Your company may follow a different process according to its business requirements.

To manage special pricing claims, channel managers and partner users perform the following tasks:

1. Submitting Special Pricing Claims (Partner Users)
2. Approving or Rejecting Special Pricing Claims (Channel Managers)

Submitting Special Pricing Claims (Partner Users)

This task is a step in Example Process of Managing Special Pricing Claims.

Complete the steps in the following procedure to submit a special pricing request claim.

To submit a special pricing request claim

1. Navigate to the SP Request page, and click the Edit link for the special pricing request for which you want to submit a claim.
2. Enter a value in the Total Claim Amount Requested field to indicate the amount of money you are requesting.

3 Set the value in the Claim Status field to Claim Submitted.

4 Save the record.

Approving or Rejecting Special Pricing Claims (Channel Managers)

This task is a step in Example Process of Managing Special Pricing Claims.

Complete the steps in the following procedure to approve or reject a special pricing request claim.

To approve or reject a special pricing request claim

1 Navigate to the special pricing request list named, Special Pricing Requests Pending My Approval.

2 Review the submitted claim with the claim status of Claim Submitted.

3 Determine what amount, if any, to approve for the special pricing request claim, and edit it as follows:

   - If the special pricing request is approved, do the following:

   a Enter the approved amount in the Total Claim Amount Approved field.

   b Enter the date of the decision in the Claim Decision Date field.

   c Set the Claim Status field to Claim Approved.

   - If the special pricing request is not approved, set the Claim Status field to Claim Denied.

4 Save the record.

   After the special pricing request claim is approved, the fund management process continues. For more information, see *Oracle CRM On Demand Online Help*.

About Applications

NOTE: *Applications* is a record type in Oracle CRM On Demand for Partner Relationship Management.

You can use the Applications record type to manage partner applications.

Table 32 describes the fields that support Oracle CRM On Demand for Partner Relationship Management Application Requirements.

Table 32. Fields Supporting Oracle CRM On Demand for Partner Relationship Management Applications

Field	Description
Request Name	The unique name of the application.
Principal Partner Account	The partner company that is leading the effort on the application.
Fund	The name of the fund associated with the application.

Table 32. Fields Supporting Oracle CRM On Demand for Partner Relationship Management Applications

Field	Description
Due Date	The date by which you must have the application approved.
Expiration Date	The date on which the application is no longer valid.
Start Date	Date and time the application starts.
End Date	Date and time the application ends.
Approver	The name of the current approver.
Approver status	Indicates the current approval status for the application.
Owner	The name of the user who currently owns the application.
Owner Partner Account	The partner account for which the owner works.
Channel Manager	Read-only. This field is populated with the channel manager's name, which is derived from the Channel Manager field on the partner record.

Managing Applications (Channel Manager)

This topic provides one example of a procedure for managing applications. Your company may follow a different process according to its business requirements.

Complete the steps in the following procedure to manage applications.

To manage applications

1. Navigate to the Application page, and create a new list to show all applications where you are the channel manager and the status is Submitted.
2. Drill down on an application, and then do the following:
   a. Verify that all appropriate information is filled out.
   b. If appropriate, approve the application.

      The application record is updated with a timestamp. For more information about managing applications, see *Oracle CRM On Demand Online Help*.

About Partner Content Management

Oracle CRM On Demand for Partner Relationship Management uses existing functionality to help brand owners do the following:

- Manage and deliver partner-specific content and collateral.

- Ensure that important materials are accessible only by the internal sales team.

Use the content management feature by selecting the Publish to PRM Users check box on the solution records. The brand owner can select this check box when adding or editing solutions. One of the following conditions applies:

- If this check box is selected for a solution, partner users can see the solution when they sign in to Oracle CRM On Demand.
- If the check box is not selected, the solution is not available to partner users.

Table 33 describes the solution field that supports content management for PRM.

Table 33. Solution Field Supporting Content Management for Oracle CRM On Demand for Partner Relationship Management

Check Box	Description
Publish to PRM Users	Selecting this check box on a solution allows the solution to be viewed by partner users.

CAUTION: It is important for brand owner users who are developing content to understand that if the Publish to PRM User check box is selected on a solution, then the solution and supporting material are visible to partner users.

Example Process of Managing Partner Content

This topic provides one example of a process for managing partner content. Your company may follow a different process according to its business requirements.

To manage partner content, channel managers and partner users perform the following tasks:

1. Publishing Solutions for Partners (Channel Managers) on page 136
2. Reviewing Solutions (Partner Users) on page 137

Publishing Solutions for Partners (Channel Managers)

This task is a step in Example Process of Managing Partner Content.

Complete the steps in the following procedure to publish solutions for partners.

To publish a solution for partner users

1. Navigate to the Solution page, and add a new solution record.
2. Enter the name of the solution, and complete other required fields.
3. Select the Publish to PRM Users check box.
4. Save the solution.

Reviewing Solutions (Partner Users)

This task is a step in Example Process of Managing Partner Content.

Complete the steps in the following procedure to review solutions.

To review solutions

- Navigate to the Solutions tab, where the you can access solutions that have been made available to partner users.

About Training and Certification Management

Training and Certification is new functionality in Oracle CRM On Demand Release 18. The Training and Certification features help you to offer training courses to your partner employees and track their skills and competencies in selling, installing, and providing after-sales service of your product offerings. Additionally, because a partner company is made up of partner employees, you can also assess its competency by the number of certified employees on its payroll. Training and Certification is part of Oracle CRM On Demand for Partner Relationship Management. In other words, you have access to the Training and Certification functionality only if Oracle CRM On Demand for Partner Relationship Management is provisioned for your company.

The Training and Certification module in Release 18 of Oracle CRM On Demand for Partner Relationship Management consists of four major functional subareas:

- Courses
- Exams
- Certifications
- Accreditations

You can configure the page appearance, security and behavior for each of these record types to suit your business requirements.

About Courses

A *course* is a structured educational program that imparts a specific set of skills to an individual. Many companies, especially those that deal with complex products or services, require their partners and resellers to be adequately trained in and familiar with what they sell. Courses thus become a mechanism to disseminate knowledge and information about a company's offerings. Typically, courses focus on a specific product or product family; however, at times, they might also deal with generic concepts or principles.

In Oracle CRM On Demand, a course is defined as being associated with a specific product or a set of products. Likewise, a course can also be associated with a single product category, several product categories, or no product categories at all. Oracle CRM On Demand enables you to capture several basic attributes of a course. However, you also have the flexibility to define your own fields and relationships on the course record to better help you meet your business requirements.

Courses might be offered by the company itself, out-sourced to designated training service providers, or both. With Oracle CRM On Demand you can define the list of third-party vendors offering the course and publish the list to partners. After a course is published, partner employees can enroll contacts on the course.

About Exams

An *exam* measures the competency of a contact in a specific set of skills. Exams are usually the next logical step for a contact after completing a course. Typically, a course culminates in exams, and the contact is expected to register and appear for the exams upon completing the course. Many companies consider that a course has been successfully completed only if a minimum score has been achieved in the exams.

You can associate an exam with products, one or more product categories, or both. You can also associate an exam with one or more courses, so that the logical progression from courses to exams is accurately reflected. Because exams are usually administered and managed by authorized testing service providers rather than by the company itself, you can also define the list of such third-party vendors for each exam. Finally, Oracle CRM On Demand enables partner employees to register for an exam any contact whom they can access.

About Certifications

A *certification* is a proof of a contact's competency in a specific set of skills. While an exam measures a person's competency, a certification actually confirms that the person is adequately competent. Certifications are typically awarded after a person has passed exams. Therefore, certifications can be thought of as a logical progression after courses and exams.

Certifications usually have an expiration date associated with them. A person who holds a certificate can claim to be certified only for a defined period, after which he or she must be recertified. When a certification does have an expiration date, the reason is usually because the skill for which the certificate was awarded is expected to either evolve or become obsolete.

Unlike courses and exams that may or may not be associated with products, a certification is usually awarded for a specific product or set of products. Oracle CRM On Demand supports the association of a certificate with courses, exams, products, product categories, and solutions. None of these associations is mandatory; you can associate as many or as few of these with a certification as appropriate. You can even define a certification that is not associated with any course, exam, product, product category, or solution.

Certifications can be requested online through Oracle CRM On Demand. Any user with the appropriate access rights and privileges can request certification for any contact to whom the user has visibility.

About Accreditations

An *accreditation* is proof of a partner company's competence to deliver a service of acceptable quality. While certifications are for an individual, accreditations are for a company. A partner company is awarded an accreditation upon satisfying several requirements; usually, one of the requirements is to have a pre-defined minimum number of employees with specific certifications on the payroll. Thus, in some ways, an accreditation can be thought of as a collection of certifications; it is the next step in the sequence of courses to exams to certifications.

Just as with the other three Training and Certification objects, accreditations can be associated with products, product categories, and solutions. They can also be related to each other. Oracle CRM On Demand also supports the ability of a user to request accreditation of their partner organization or any partner company to which they have visibility.

Example Process of Managing a Course

This topic provides an example of a typical process for managing a course. Your company may follow a different process according to its business requirements. This process is similar for accreditations, certifications, and exams.

To manage a course, perform the following tasks:

1. Creating a Course on page 139
2. Associating a Course with Products, Product Categories, and Solutions on page 140
3. Defining Dependencies on Other Courses on page 141
4. Associating a Course with Exams and Certifications on page 141
5. Making a Course Visible to Partners on page 141
6. Enrolling in a Course on page 142
7. Updating the Course Enrollment Record on page 142

Creating a Course

This task is a step in Example Process of Managing a Course.

Only three fields are required when creating a course: the Name, Status, and Owner fields. You can make additional fields mandatory through configuration. Complete the following steps to create a course.

To create a course

1. Navigate to the Course page, and create a new course
2. Specify the details for the course as follows:
   a. Type a name for the course.

      The name must be unique and is case-sensitive.

- **b** Modify the status to an appropriate value, if necessary.

  The default status is Draft.

- **c** Select the primary product only if you believe that this course is mainly targeted at a single product. If this course is appropriate for several products, leave this field blank.

- **d** Select the primary product category only if you believe that this course is mainly targeted at a single product category. If this course is appropriate for several product categories, leave this field blank.

- **e** Select the Available From and Available Till dates, if known.

  These two dates determine the Recently Introduced Courses and Retiring Courses lists on the course home page.

- **f** Enter all the known details about the course, such as the duration, course fee, format, and so on.

- **g** In the Contact Information Section, specify the point-of-contact for the course. Do one of the following:

  - If the point-of-contact already exists as a contact in Oracle CRM On Demand, use the Contact drop-down list.
  - If the point-of-contact is not defined in Oracle CRM On Demand, then enter the details using the text fields, such as First Name, Last Name, and so on.

- **h** The default value for the owner is your user name. If you want to make some other user as the owner of the course, specify that user name in the Owner field.

3 Save the course record.

Associating a Course with Products, Product Categories, and Solutions

This task is a step in Example Process of Managing a Course.

You can associate a course with one or more products and product categories. If the course is appropriate for only one product or one product category, then use the Primary Product field or Primary Product Category field. If the course is applicable to more than one product or more than one product category, perform the following task.

Complete the steps in the following procedure to associate a course with products, product categories, and solutions.

To associate a course with products, product categories, and solutions

1. In the Course Products, Course Product Category, or Course Solutions related item section, click Add.
2. On the edit page, specify the product, product category, or solution, and click Save.
3. Repeat Step 1 and Step 2 as many times as necessary to define all the relationships.

NOTE: Perform the previous task to relate a course to solutions, regardless of whether the course is related to one solution or many solutions.

Defining Dependencies on Other Courses

This task is a step in Example Process of Managing a Course.

A course is usually related to other courses as a prerequisite, follow-up, and so on. Oracle CRM On Demand enables you to define these relationships by performing the following task. However, these relationships are not enforced and exist only for informational purposes.

Complete the steps in the following procedure to define dependencies on other courses.

To define dependencies on other courses

1. In the Related Courses related item section, click Add.
2. In the Related Course edit page, specify the related course and the relationship.
3. Click Save.
4. Repeat Step 1 through Step 3 as many times as necessary to define all the relationships.

NOTE: The list of values in the Relationship field is configurable. You can add, modify, or remove items from the relationship list.

Associating a Course with Exams and Certifications

This task is a step in Example Process of Managing a Course.

A course usually culminates in one or more exams. If the contacts pass the exam, they are awarded certificates. You can associate a course with exams or certifications or both.

Complete the steps in the following procedure to associate a course with exams and certifications.

To associate a course with exams and certifications

1. In the Course Exams or Certification Courses related item section, click Add.
2. On the Edit page, specify the exam or certification, as appropriate.
3. Repeat Step 1 and Step 2 to add additional exam or certificate relationships.

Making a Course Visible to Partners

This task is a step in Example Process of Managing a Course.

A course does not automatically become visible to partners. You can make the course visible by adding partner employees to a team, and associating that team with the course record.

Complete the steps in the following procedure to make a course visible to partners.

To make a course visible to partners

1. In the Course Team related item section, click Add.

2 On the Edit page, specify the user name, team role, and record access.

NOTE: It is recommended that you grant read-only access to the team member employees of the partner.

3 Click Save

Enrolling in a Course

This task is a step in Example Process of Managing a Course.

Oracle CRM On Demand enables a partner user to enroll in any course that is visible to him or her.

Complete the steps in the following procedure to enroll in a course.

To enroll in a course

1 In the Course Enrollment related item section, click Enroll.

The course name is automatically populated. However, you can modify it using any valid course.

2 In the Candidate field, specify a contact.

You can specify any contact to whom you have visibility.

3 If this enrollment is part of a broader business objective, you can specify the objective as well.

4 Complete the other fields, such as Enrollment Date, Completion Date, and so on.

NOTE: The Enrollment Status field is read-only for the partner sales representative role.

5 If you are enrolling in a course that is offered by a third-party vendor and not by the company itself, specify the vendor name in the Course Partner field, assuming the vendor is defined as a partner in Oracle CRM On Demand and is visible.

6 Specify the other fields, as appropriate.

7 Click Save.

NOTE: Sometimes, an individual might repeat a course. Therefore, Oracle CRM On Demand supports multiple enrollments for the same individual so long as the enrollment date is different. An individual cannot enroll in the same course with the same enrollment date and the same owner more than once. Additionally, the course enrollment record also provides you with the flexibility of adding custom fields.

Updating the Course Enrollment Record

This task is a step in Example Process of Managing a Course.

The course enrollment record can be updated by users with the appropriate access rights. Only brand-owner roles, such as channel manager, can update the Status field on the enrollment record. All other fields can be updated by partner roles as well. You can modify this behavior by updating the appropriate page layouts.

Complete the steps in the following procedure to update an enrollment record.

To update an enrollment record

1. On the Course Enrollment related item section, click the Edit link for the enrollment record that you want to modify.
2. On the Course Enrollment Edit page, modify the fields as appropriate.
3. Click Save.

NOTE: The default permissible values for the Enrollment Status field are: Enrolled, Completed, and Incomplete. However, your company administrator can modify this list to suit your business requirements.

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