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PeopleSoft Partner Relationship Management 9.1 PeopleBook

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Contents

Oracle's PeopleSoft CRM Partner Relationship Management Preface

This preface discusses:

- Additional resources.
- PeopleSoft application fundamentals.
- PeopleSoft automation and configuration tools.
- PeopleSoft business object management.
- PeopleTools PeopleBooks.

Note. This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line.

PeopleSoft Application Fundamentals

The *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook* contains essential information describing the setup and design of the PeopleSoft CRM system. This book contains important topics that apply to many or all PeopleSoft applications across the PeopleSoft CRM product line.

The *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook* contains these parts:

- CRM Multi-Product Foundation

  This part discusses the design and setup of the PeopleSoft CRM system, including security considerations.

- Workforce Management

  This part discusses how to administer workers who perform tasks such as support or field service in PeopleSoft CRM. It includes information on competency management and assigning workers to tasks.

- Interactions and 360-Degree Views

  This part discusses how to manage interactions and set up and use the 360-degree view, a powerful tool that enables users to view and work with any transaction or interaction that is associated with a customer or worker.

- Self-Service for Customers

  This part discusses how to set up, administer, and use self-service applications for customers and workers.

- Relationship Management

  This part discusses how system users manage their contacts and tasks.

- Entitlement Management

  This part discusses setting up agreements and warranties.

- SmartViews

  This part discusses how to set up and use SmartViews to manage key customer segments and accounts in a central environment.

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Oracle's PeopleSoft CRM Application Fundamentals Preface"

PeopleSoft Automation and Configuration Tools

The *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*discusses automation and configuration tools that are common to multiple PeopleSoft CRM applications. This is an essential companion to the *PeopleSoft CRM Application Fundamentals PeopleBook.*

There are four parts to the *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*

- Correspondence Management

  This part discusses the setup and application of manual notifications, automatic notifications and manual correspondence requests among CRM objects.

- Automation Tools

  This part discusses PeopleSoft CRM workflow, the Active Analytics Framework (OAF), business projects, and scripts.

- Configuration Tools

  This part discusses configurable search pages, configurable toolbars, attributes, and industry-specific field labels and field values.

- Knowledge Management

  This part discusses Verity search setup.

- Business Process Management

  This part provides information on the two different approaches to manage business processes in PeopleSoft CRM and discusses:

  - The setup of the BPEL infrastructure to initiate and manage BPEL process instances.
  - The setup of Business Process Monitor to view the status information of initiated BPEL process instances.
  - The setup of BPEL worklist integration to send CRM worklist entries (both notifications and action items) from BPEL processes.
  - The setup and execution of business projects.

See Also

PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook, "Oracle's PeopleSoft CRM Automation and Configuration Tools Preface"

PeopleSoft Business Object Management

The *PeopleSoft CRM 9.1 Business Object Management PeopleBook* discusses how to create and manage customer and worker business objects in PeopleSoft CRM.

The *PeopleSoft CRM 9.1 Business Object Management PeopleBook* has these parts:

- Business Object Management Basics

  This part provides an overview of the business object relationship model and discusses setting up role types, relationship types, and control values.

- Data Management for Organization Business Objects

  This part discusses how to set up and manage companies, sites, and partner companies.

- Data management for Individual Business Objects

  This part discusses how to set up and manage persons, including contacts and consumers, and workers.

- Business Object Management

  This part discusses how to define and use business object searches, quick create, and the customer identification framework to manage business objects.

- Customer and Worker Data Integrations

  This part discusses how to integrate customer and worker data with other systems.

See Also

PeopleSoft CRM 9.1 Business Object Management PeopleBook, "Oracle's PeopleSoft CRM Business Object Management Preface"

PeopleTools PeopleBooks

Cross-references to PeopleTools documentation refer to the PeopleTools 8.52 PeopleBooks.

PeopleBooks and the PeopleSoft Online Library

A companion PeopleBook called *PeopleBooks and the PeopleSoft Online Library* contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the locally installed PeopleSoft online library, including web site folders.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Application abbreviations found in application fields.

You can find *PeopleBooks and the PeopleSoft Online Library* in the online PeopleBooks Library for your PeopleTools release.

Chapter 1

Getting Started with PeopleSoft Partner Relationship Management

This chapter provides an overview of PeopleSoft Partner Relationship Management and discusses:

- PeopleSoft Partner Relationship Management integrations.
- PeopleSoft Partner Relationship Management implementation.

PeopleSoft Partner Relationship Management Overview

PeopleSoft Partner Relationship Management (PeopleSoft PRM) encompasses all the processes necessary for modeling partners and profile information, registering partners, managing security, analyzing performance, and allowing partners to effectively interact with an enterprise via a partner portal.

Oracle has integrated PeopleSoft PRM capabilities into many parts of the PeopleSoft Customer Relationship Management (PeopleSoft CRM) process, including marketing, sales, commerce, and service. This comprehensive enablement of PeopleSoft PRM through the PeopleSoft CRM product family makes it possible for you and your partners to share PeopleSoft CRM features, functionality, and transactions, including leads, quotes, orders, cases, and more.

PeopleSoft PRM encompasses four phases in the partner lifecycle:

- Definition of partner strategy and programs, including program objectives and membership structures.

  Features like Partner Programs help you define and describe program details for various partner categories and participation levels.

- Partner recruitment and acquisition, with tools that include configurable online application forms and dialog recruitment that capture all information in a single repository.

  This information is accessible in a comprehensive Partner Profile that provides a single, at-a-glance partner overview.

- Engagement of partners in business processes across the enterprise, including marketing, sales, commerce, service, or all of these.
- Management of the ongoing partner relationship, including reviewing and rewarding partner performance, and determining which relationships should be invested in and which should be terminated.

This diagram illustrates the four phases of the partner lifecycle:

Partner Lifecycle

PeopleSoft Partner Relationship Management Integrations

PeopleSoft PRM is enabled in the following PeopleSoft applications:

- PeopleSoft Order Capture and Order Capture Self-Service.
- PeopleSoft Sales.
- PeopleSoft Marketing.
- PeopleSoft Online Marketing.
- PeopleSoft Strategic Account Planning.
- PeopleSoft Support.
- PeopleSoft Advanced Configurator and PeopleSoft Advisor

We discuss integration considerations in the implementation chapters of this PeopleBook.

PeopleSoft Partner Relationship Management Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

PeopleSoft Sales/PeopleSoft Partner Sales also provides component interfaces to help you load data from your existing system into PeopleSoft Sales tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables relevant for your PRM enablement activities.

This table lists the component that has a component interface:

Component	***Component Interface***	***Reference***
Partner RD_PARTNER_CI	RD_PARTNER_CI_API	See and Chapter 5, "Creating and Maintaining Partner Profiles," page 25.

Other Sources of Information

In the planning phase of your implementation, take advantage of all Oracle sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface in the *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook,* with information about where to find the most current version of each.

See Also

PeopleTools 8.52: PeopleSoft Component Interfaces PeopleBook

PeopleTools 8.52: PeopleSoft Setup Manager PeopleBook

Chapter 2

Understanding PeopleSoft Partner Relationship Management

This chapter discusses:

- PeopleSoft Partner Relationship Management (PeopleSoft PRM).
- PeopleSoft PRM business processes.

PeopleSoft Partner Relationship Management

This section discusses:

- PeopleSoft Lifecycle Management and the Partner Platform.
- Partner programs.
- Partner profile and administration.
- Application security.
- Partner recruitment and registration.
- Distributed security and self-administration.
- Partner Portal and managing transactions.

PeopleSoft Lifecycle Management

PeopleSoft's Partner Lifecycle Management encompasses four phases:

- Definition of partner strategy and programs, including program objectives and membership structures.

  Features such as Partner Programs help you define and describe program details for various partner categories and participation levels.

- Partner recruitment and acquisition, with tools that include online application forms and dialog recruitment that capture all information in a single repository.

  This information is accessible in a comprehensive Partner Profile that provides a single, at-a-glance partner overview.

- Engagement of partners in business processes across the enterprise, including marketing, sales, commerce, service, or any combination of these business processes.

- Management of the ongoing partner relationship, including reviewing and rewarding partner performance, and determining which relationships should be invested in and which should be terminated.

The PeopleSoft Partner Platform is the foundation for the PeopleSoft PRM solution. It has a robust security model, comprehensive yet extensible partner data model, and core partner lifecycle management features and functionality. Partner program administrators can easily configure business rules in the dynamic partner security model to only grant partner users access to data that is appropriate, such as select rows of customer data, partner-relevant transactions, and functional actions and prompting capabilities within each of the transactions. Prospective partners can register for specific partner programs via online application forms that are easily configurable by a partner program administrator. Once a partner is approved, enterprise channel managers and enterprise alliance managers can begin to build a centralized repository of profile data on each partner that can be leveraged for lead distribution, partner catalog management, and targeted communications. The Channel Manager will have access to a 360-degree view of partner information for an overview of transactions and interactions associated to the partner. PeopleSoft Partner Management extends an enterprise's business processes and delivers the tools necessary to execute a successful partner strategy.

Partner Programs

In many partner relationship scenarios, a partner or alliances organization may group partners into different programs and categories, each with different requirements, benefits of membership, and so forth. A Partner Program is a new database object and a distinct component. An Enterprise Channel Manager can specify different partner programs and the related requirements, benefits, and fees for each program. Partner companies can apply for partnership and membership in one or more partner programs.

See and Chapter 4, "Creating Partner Programs," page 13.

Partner Profile and Administration

Partner profiling captures and maintains detailed partner and relationship information. Critical pieces of information about a partner's business, industry, and operational area should be captured. These pieces of information change from industry to industry and from business to business.

Partner profile information is crucial to lead assignment, territory management, pricing, and other important business functions. PeopleSoft PRM's flexible solution accommodates an unlimited number of partner types, attributes, and relationships. Your organization cannot only capture the characteristics of the partner organization, but also the characteristics of people or objects within that organization. Partner profiles are determined by the relationship with the partner, the role the partner plays, and how the partner interacts with your organization.

See and Chapter 5, "Creating and Maintaining Partner Profiles," page 25.

Application Security

The Application Security Framework has three key elements: who has access, what transactions or rows they can see, and what functions they can perform. PeopleSoft PRM delivers a flexible and dynamic way of creating and defining membership lists that are based on configurable criteria. This feature, the View List, reduces maintenance overhead that is a result of creating multiple roles—one for every possible combination and permutation of permissions and functions. The View List determines what the security membership can access and see, which secures customer data from partners. When a partner CSR logs into the Order Capture application, the customers that he or she can prompt on can be automatically restricted to only the customers that the enterprise allows the partner to see. Finally, the Functional Options concept provides an additional level of granularity and control over what users can do within a PIA page. PeopleSoft PeopleTools allows users to be granted access to specific pages in an application; once the user has access, he or she can access any part of that page. When extending transactions to partner and third-party users, a critical issue is limiting what they can do from a risk management and data security point of view.

See and Chapter 6, "Setting Up Security for Partners," page 53.

Partner Recruitment and Registration

When your organization uses partners to penetrate or expand into specific sales territories, it can conduct marketing campaigns to recruit potential partners with specific characteristics that meet the ideal target partner profile. For example, a partner recruiting campaign can have a call to action that brings a prospective partner to an online self-registration or application page. Based on the responses of those campaigns, partners can be further qualified and approved as part of the recruitment process. Prospective partners can register at the web site of the enterprise and apply for partnership.

Once potential partners are identified through prospecting and recruitment campaigns, partner registration allows your enterprise to capture profiling information about the partner company and partner employees. In addition to allowing internal enterprise users to capture partner information, partners themselves have access to online self-service registration for data entry and maintenance of user profile information.

See and Chapter 7, "Setting Up and Managing Partner Registration," page 67.

Distributed Security and Self-Administration

Distributed security enables partners to administer access to the PeopleSoft PRM solution for their partner employees. For enterprise channel management personnel, setting up a partner company can be time consuming, but the prospect of setting up and tracking partner employee users is more challenging and time consuming. Such activities should be delegated to the partners to reduce maintenance costs and empower the partners. Partners should be able to create and administer their own personnel records and logins within the confines of the security boundaries defined by the enterprise.

See and Chapter 8, "Setting Up Distributed Security for Partner Users," page 79.

Partner Portal and Transaction Management

The PeopleSoft PRM solution delivers a new portal registry specifically for partner users. The Partner Portal exposes only those transactions appropriate for your partner users, and provides a home page that can be configured for each partner user. The partner portal includes pagelets that can contain lists of transactions and, along with the PeopleSoft Applications Portal, customized news and content.

From the Partner Portal, a partner can access and manage partner user profile information and manage leads, view product catalogs, and manage quotes and orders.

The enterprise can also view and enter partner specific data within the core transactions of lead, opportunity, order, quote, and support case. An agent or sales representative can reference the partner company and contact information for core enterprise transactions. Using the Partner 360-Degree View, a channel manager can then view all of a partner's activities with the enterprise.

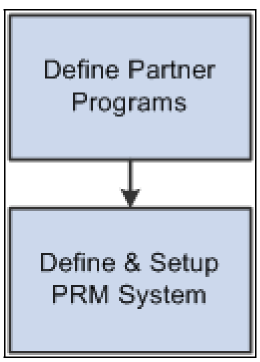
See and Chapter 9, "Executing Partner Relationship Management Transactions," page 91.

PeopleSoft PRM Business Processes

PeopleSoft PRM consists of four main business processes:

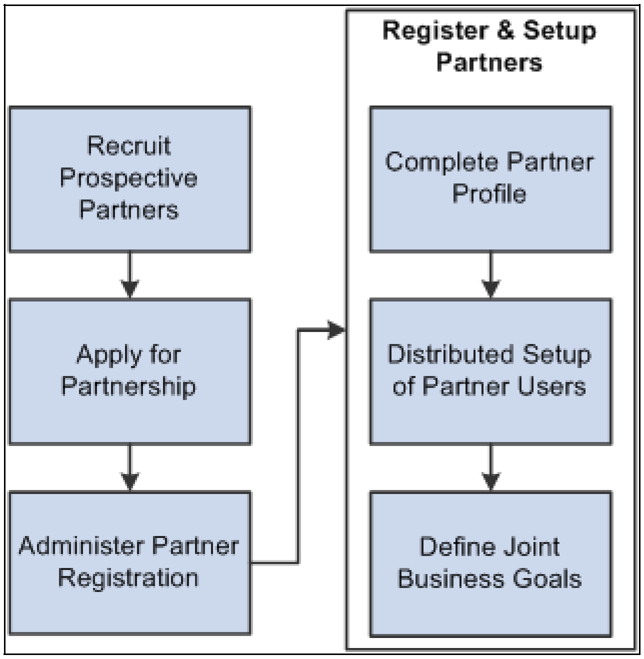
- Defining the partner strategy and programs.
- Acquiring partners.
- Engaging partners in business processes.
- Managing the partner relationship.

This diagram illustrates the definition phase of the PeopleSoft PRM business process, during which partner programs are defined and the PRM system is defined and set up:



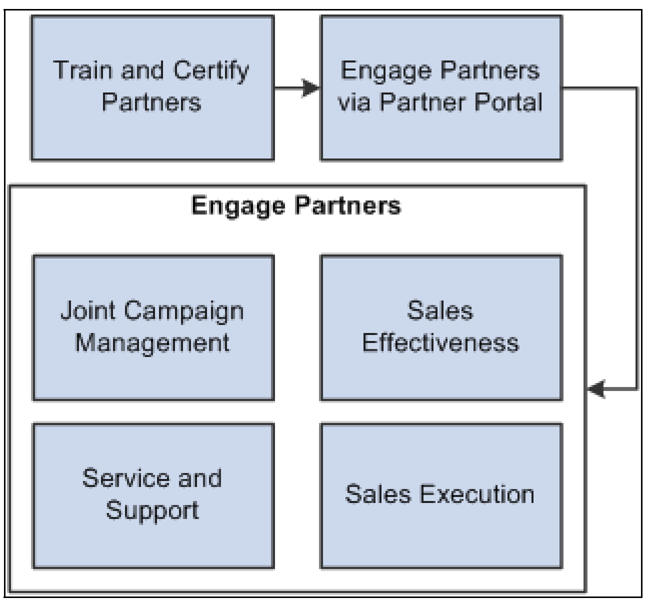
Defining partners

This diagram illustrates the acquisition phase of the PeopleSoft PRM business process, during which partners are recruited and registered, and set up:



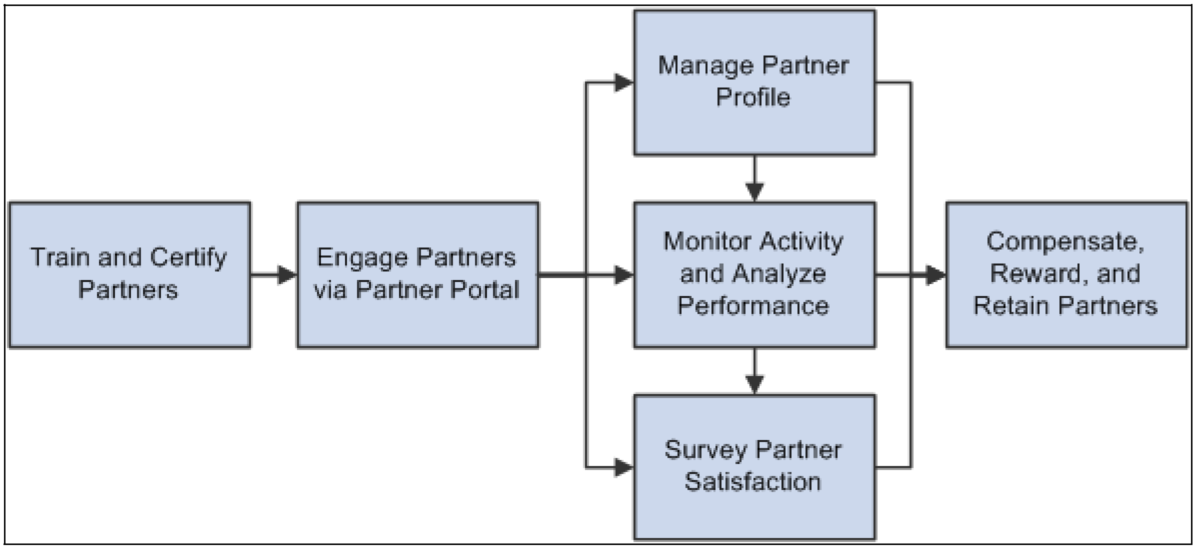
Acquiring partners

This diagram illustrates the engagement phase of the PeopleSoft PRM business process, during which partners are trained, certified, and engaged via the Partner Portal:



Engaging partners

This diagram illustrates the management phase of the PeopleSoft PRM business process, during which partners are managed, monitored, and rewarded:



Managing partners

Chapter 3

Navigating in PeopleSoft Partner Relationship Management

This chapter discusses how to navigate in PeopleSoft Partner Relationship Management.

Navigating in PeopleSoft Partner Relationship Management

PeopleSoft Partner Relationship Management provides functional area navigation pages that support a specific set of business processes or tasks.

Note. In addition to the PeopleSoft Partner Relationship Management functional area navigation pages, PeopleSoft Partner Relationship Management provides menu navigation, standard navigation pages, and PeopleSoft Navigator.

See Also

PeopleTools 8.52: PeopleSoft Applications User's Guide

Pages Used to Navigate in PeopleSoft Partner Relationship Management

This table lists the custom functional navigation pages that are used to navigate in PeopleSoft Partner Relationship Management:

Partner Management Center

The Partner Management Center page will be used by the person in your organization who focuses on the partner business process. In PeopleSoft Partner Relationship Management, this person would normally be the Enterprise Channel Manager.

Page Name	***Navigation***	***Usage***
Partner Management Center	Main Menu, Partner Management Center	Manage all partner activities.
Partner Companies	Click the Partner Companies link on the Partner Management Center page.	Add and manage profile information for partners companies.

Page Name	***Navigation***	***Usage***
Contacts	Click the Contacts link on the Partner Management Center page.	View and manage your partner contacts.
My Partners	Click the My Partners link on the Partner Management Center page.	Access business plans for specific partners.
Partner Programs	Click the Partner Programs link on the Partner Management Center page.	Create and manage partner programs and related marketing dialogs for partner applications and recruitment.
Research Partner Activity	Click the Research Partner Activity link on the Partner Management Center page.	View all activities related to a partner.
Calendar and Tasks	Click the Calendar and Tasks link on the Partner Management Center page.	Access your monthly calendar to update or review tasks and events.
Marketing Programs	Click the Marketing Programs link on the Partner Management Center page.	View and manage marketing programs and campaigns.

Chapter 4

Creating Partner Programs

This chapter provides overviews of partner relationship programs and partner types and subtypes and discusses how to:

- Set up the partner program environment.
- Create dialogs for partner programs.
- Create partner programs.

Understanding Partner Relationship Programs

PeopleSoft Partner Relationship Management delivers statuses, steps, actions, and several predefined types to automatically enable Partner Relationship Management. To take full advantage of the application, you should review your business processes and determine if any additional Partner Relationship Management types or characteristics exist that might be appropriate for your business.

Understanding Partner Types and Subtypes

PeopleSoft Partner Relationship Management delivers three partner types with a number of corresponding subtypes. This table lists the partner types and subtypes delivered as sample data:

Partner Types	***Partner Subtypes***
Alliance (ALLC)	*System Integrator (0010)* *Consultant (0020)* *Independent Software Vendor (0030)* *Advisor (0040)* *Analyst (0050)* *Strategic Alliance Partner (0060)* *Joint Marketing Partner (0070)* *Development Partner (0080)*

Partner Types	***Partner Subtypes***
Channel (CHNL)	*Distributor (0010)* *Reseller (0020)* *Agent (0030)* *Broker (0040)* *Wholesaler (0050)* *Dealer (0060)* *Value-Added Reseller (0070)* *Value-Added Distributor (0080)*
Service/Fulfillment (SVC)	*Content Provider (0010)* *Installation Provider (0020)* *Repair Services Provider (0030)* *Outsourced Call Center Vendor (0040)* *Outsourced Service Provider (0050)* *Application Outsourcing Services (0060)* *Managed Services Provider (0070)*

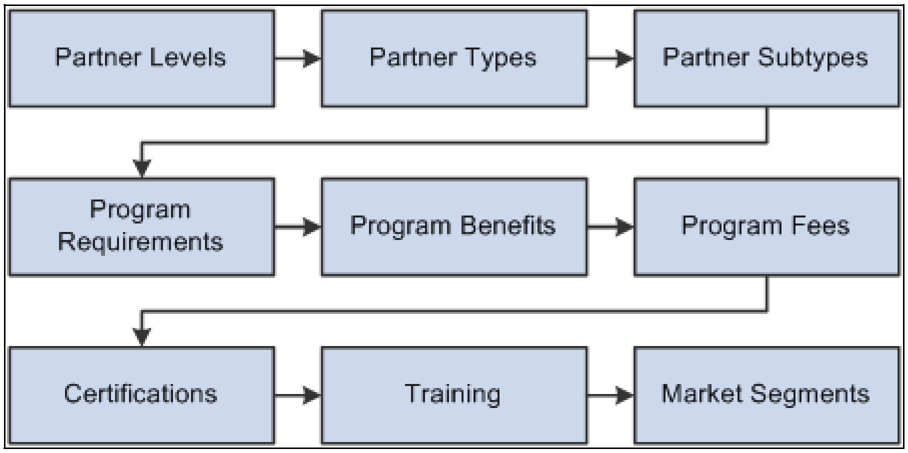
Setting Up the Partner Program Environment

To set up the partner program environment, use the Certifications (RD_CERTIFICATION), Market Segments (RD_MARKET_SEG), Partner Levels (RD_PR_LEVEL), Program Benefits (RD_PR_PGM_BEN), Program Fees (RD_PR_PGM_FEE), Program Requirements (RD_PR_PGM_REQ), Add Partner Program (RD_PR_PROG), Partner Types/Subtypes (RD_PR_TYPE), and Training (RD_TRAINING) components.

This section discusses how to:

- Define partner levels.
- Define partner types.
- Define partner subtypes.
- Define partner program requirements.
- Define program benefits.
- Define program fees.
- Define certifications.
- Define training.
- Define market segments.

This diagram illustrates the steps to set up partner program control tables. Each of these steps is described in a subsequent section:



Setting up partner program tables

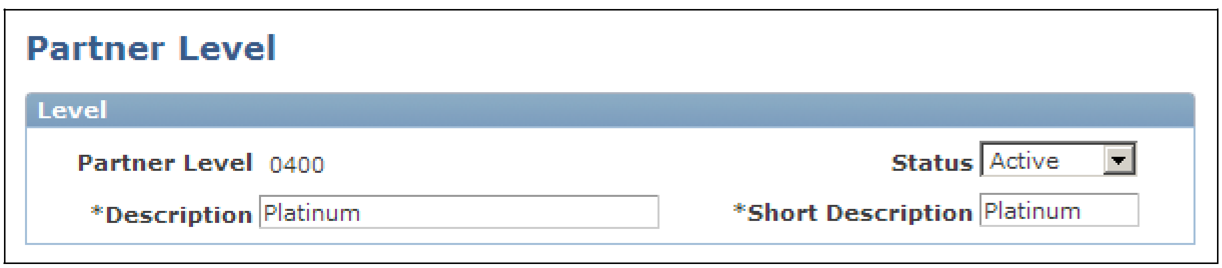
Pages Used to Set Up The Partner Program Environment

Page Name	***Definition Name***	***Navigation***	***Usage***
Partner Level	RD_PR_LEVEL	Set Up CRM, Product Related, Partner Management, Partner Levels, Partner Level	Define partner levels that enable the enterprise to group partners and determine partner privileges.
Partner Type	RD_PR_TYPE	Set Up CRM, Product Related, Partner Management, Partner Types/Subtypes, Partner Type	Define partner types, such as alliance, channel, fulfillment.
Partner Subtype	RD_PR_SUBTYPE	Set Up CRM, Product Related, Partner Management, Partner Types/Subtypes, Partner Type, Partner Subtype	Define partner subtypes for your partner types. Examples are reseller, broker, or agent.
Partner Program Requirement	RD_PR_PGM_REQ	Set Up CRM, Product Related, Partner Management, Program Requirements, Partner Program Requirement	Establish available program requirements for partners.
Partner Program Benefit	RD_PR_PGM_BEN	Set Up CRM, Product Related, Partner Management, Program Benefits, Partner Program Benefit	Establish partner program benefits.

Page Name	Definition Name	Navigation	Usage
Partner Program Fees	RD_PR_PGM_FEE	Set Up CRM, Product Related, Partner Management, Program Fees	Establish fees for the programs.
Certifications	RD_CERTIFICATION	Set Up CRM, Product Related, Partner Management, Certifications, Certifications	Add certifications for partners.
Training	RD_TRAINING	Set Up CRM, Product Related, Partner Management, Training, Training	Add training relevancies for partner programs.
Market Segment	RD_MARKET_SEG	Set Up CRM, Product Related, Partner Management, Market Segments, Market Segment	Add market segments for partners.

Defining Partner Levels

Access the Partner Level page (Set Up CRM, Product Related, Partner Management, Partner Levels, Partner Level).



Partner Level page

Level

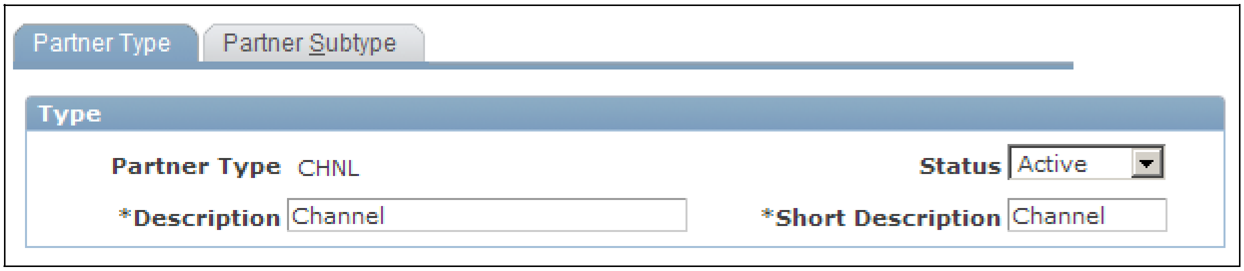
Partner Level Unique alphanumeric identifier that is manually assigned to each level defined.

Status *Active:* The partner level can be used in partner programs.

Inactive: The partner level cannot be used in partner programs.

Define Partner Types

Access the Partner Type page (Set Up CRM, Product Related, Partner Management, Partner Types/Subtypes, Partner Type).



Partner Type page

Type

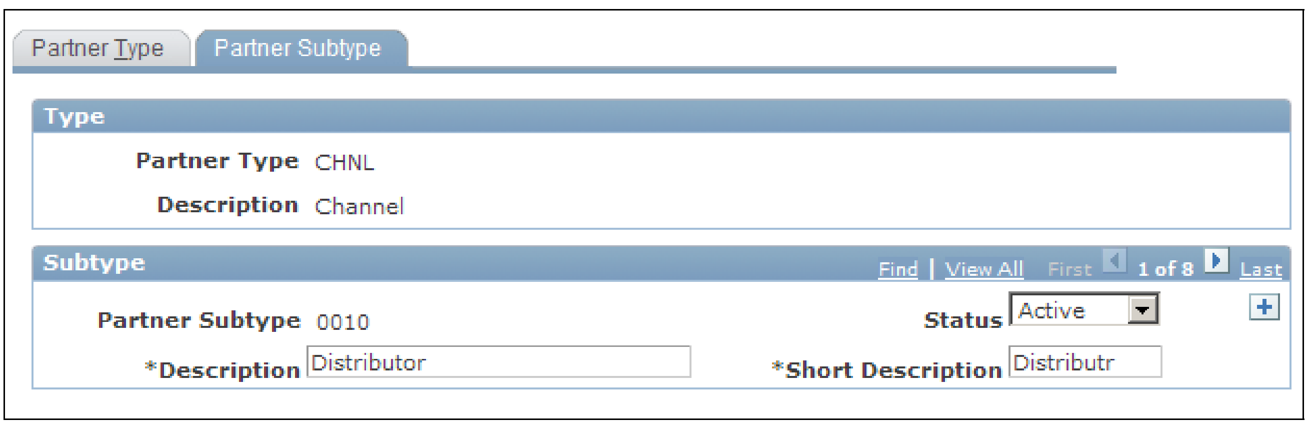
Partner Type

View unique alphanumeric identifier.

PeopleSoft Partner Relationship Management delivers three partner types: *Alliance (ALLC), Channel (CHNL),* and *Service/Fulfillment (SVC).*

Defining Partner Subtypes

Access the Partner Subtype page (Set Up CRM, Product Related, Partner Management, Partner Types/Subtypes, Partner Subtype).



Partner Subtype page

Type

Partner Type

View unique alphanumeric identifier.

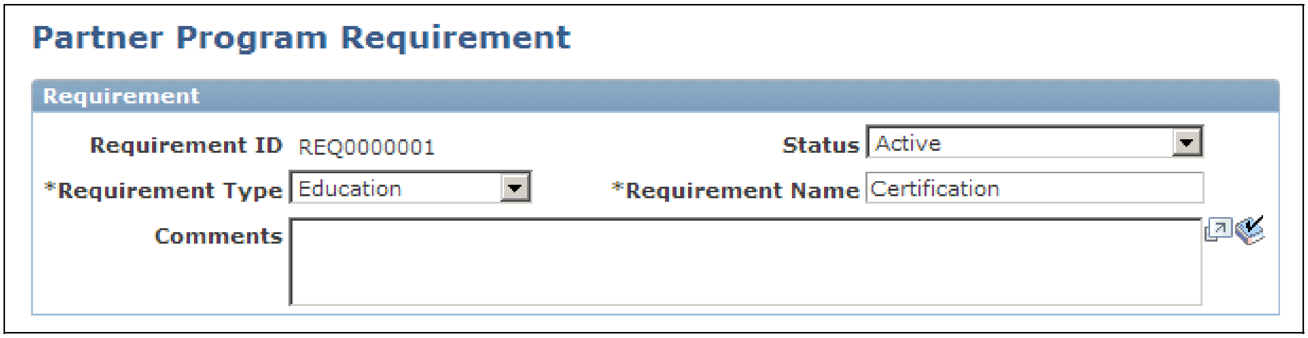
Subtype

Partner Subtype

View or add a unique numerical identifier.

Defining Partner Program Requirements

Access the Partner Program Requirement page (Set Up CRM, Product Related, Partner Management, Program Requirements, Partner Program Requirement).



Partner Program Requirement page

Requirement

Requirement ID

View unique alphanumeric identifier.

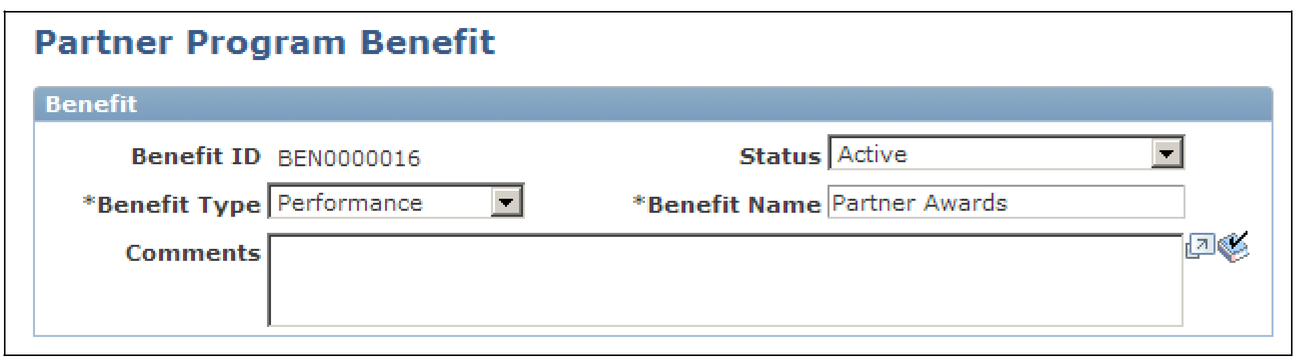
Requirement Type

Select a requirement type. PeopleSoft CRM delivers seven requirement types. They are translate values; therefore, you can only modify or add to them in PeopleTools Application Designer.

The requirement types available for selection are *Contract*,*Education*, *Financial*,*Market Coverage*,*Market*,*Planning and Performance*, and *Staffing*.

Defining Program Benefits

Access the Partner Program Benefit page (Set Up CRM, Product Related, Partner Management, Program Benefits, Partner Program Benefit).



Partner Program Benefit page

Benefit

Benefit ID

View unique alphanumeric identifier.

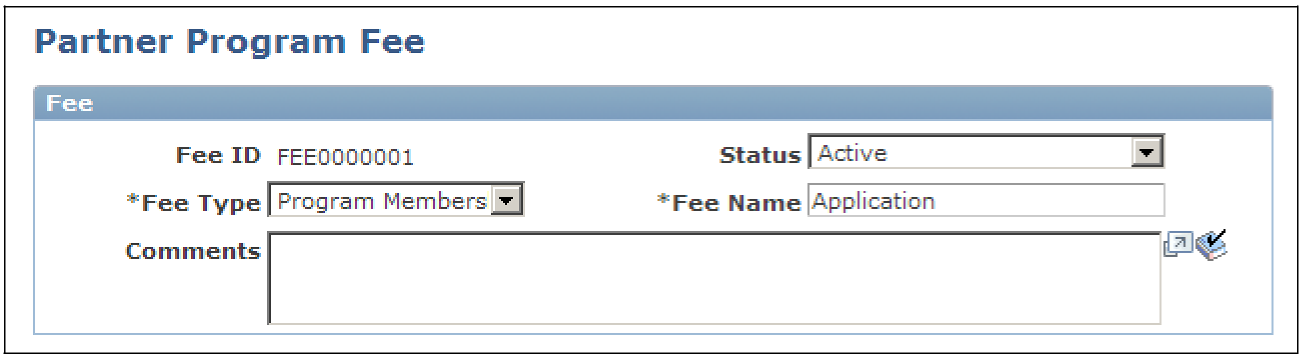
Benefit Type

Select a benefit type. PeopleSoft CRM delivers six benefit types. These are translate values; therefore, you can only modify or add to them in PeopleSoft PeopleTools Application Designer.

The benefit types available for selection are *Education, Financial, Interactions,Marketing,Performance,* and *Support.*

Defining Program Fees

Access the Partner Program Fee page (Set Up CRM, Product Related, Partner Management, Program Fees).



Partner Program Fee page

Fee

Fee Type

Select a fee type. PeopleSoft CRM delivers three fee types. These are translate values; therefore, you can only modify or add to them in PeopleTools Application Designer.

The fee types available for selection are *License,Marketing,* and *Program Membership.*

Defining Certifications

Access the Certifications page (Set Up CRM, Product Related, Partner Management, Certifications, Certifications).

Defining Training

Access the Training page (Set Up CRM, Product Related, Partner Management, Training, Training).

Defining Market Segments

Access the Market Segment page (Set Up CRM, Product Related, Partner Management, Market Segments, Market Segment).

Note. PeopleSoft CRM delivers no market segments that work immediately, without intervention from the customer.

Creating Dialogs for Partner Programs

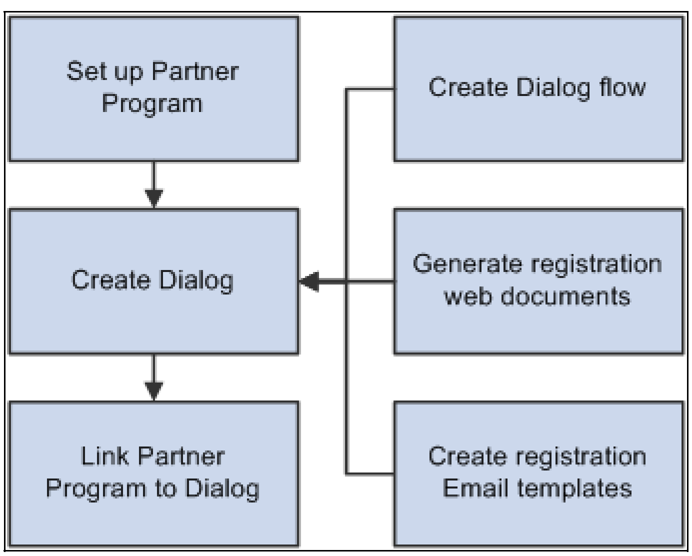
This section provides an overview of dialog use in partner programs and discusses how to:

- Create partner registration logic using the dialog designer.
- Use the document page in document designer to tailor the look and feel of the dialog.
- Use the designer page in document designer to define specific display preferences.

Understanding Dialog Use in Partner Programs

Dialogs are created for the self-service partner registration process. However, when you define a partner program, you are asked to associate a partner registration dialog with that program. For you to do this, a registration dialog must already exist in the system, which means that you may want to create your partner registration dialogs first, although the assignment of a dialog to a partner program is optional.

The following diagram illustrates the setup flow for partner registration, moving through setup, dialog creation, and the linking of a partner program to a dialog:



Partner registration setup flow

Pages Used to Create Dialogs

Page Name	***Definition Name***	***Navigation***	***Usage***
Dialog page	RY_DIALOG	Marketing, Dialog Designer, Dialog	Create a dialog for partner registration.
Flow page	RYE_FLOW	Click the Flow tab on the Dialog Designer.	Design the dialog flow of the dialog and define the various dialog elements.
Audiences page	RYE_AUDIENCE	Click the Audiences tab on the Dialog Designer.	Use to select existing audiences for the dialog or to define new audiences.
Documents page	RY_DOC	Marketing, Document Designer, Document	Create the display preferences for a web document or an email document.
Elements page	RYE_ELEMENTS	Click the Elements tab on the Dialog Designer.	Use to manage the objects in the Dialog Designer interface.

Creating Partner Registration Logic Using the Dialog Designer

Access the Dialog Designer (Marketing, Dialog Designer, Dialog Designer).

See and *PeopleSoft Online Marketing 9.1 PeopleBook*, "Designing Online Dialogs," Adding a New Dialog.

See and *PeopleSoft Online Marketing 9.1 PeopleBook*, "Designing Online Dialogs," Defining the Flow of the Dialog.

See and *PeopleSoft Online Marketing 9.1 PeopleBook*, "Designing Online Dialogs," Selecting Audiences for the Dialog.

See and *PeopleSoft Online Marketing 9.1 PeopleBook*, "Designing Online Dialogs," Defining Documents for the Dialog.

See and *PeopleSoft Online Marketing 9.1 PeopleBook*, "Designing Online Dialogs," Viewing Dialog Elements.

Creating Partner Programs

This section discusses how to:

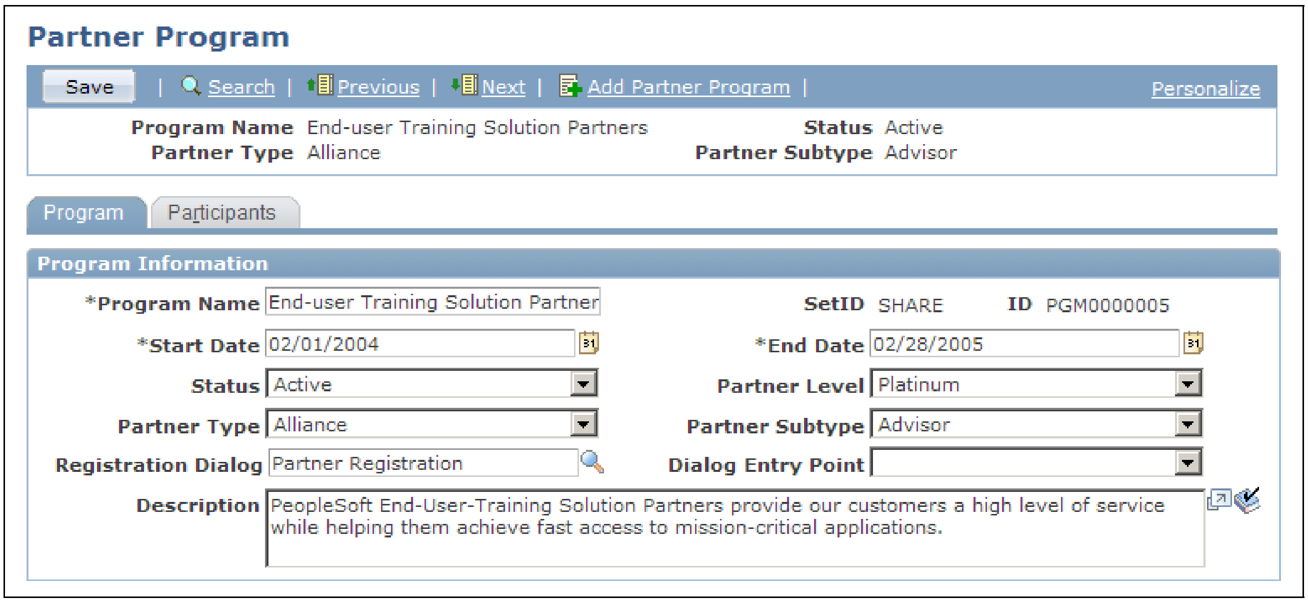
- Define partner programs.
- View partner program participants.

Pages Used to Create Partner Programs

Page Name	*Definition Name*	*Navigation*	*Usage*
Partner Program	RD_PR_PROG	Partners CRM, Add Partner Program, Partner Program, Program	Add a partner program
Partner Program — Participants	RD_PR_PROG_PARTIC	Partners CRM, Add Partner Program, Partner Program, Participants	View, edit, or add partner companies that are program participants,

Defining Partner Programs

Access the Partner Program page (Partners CRM, Add Partner Program, Partner Program, Program).



Partner Program page

Program Information

Program Name Enter a name for the partner program.

Start Date This is the date the program will go into effect.

End Date This is the date the program will no longer be in effect.

Status	*Active:* The program can be associated with partners. *Inactive:* The program can not be associated with partners. *Pending:* The program is being created, but can not yet be associated with partners.
Partner Level	Choose a partner level.
Partner Type	Select a partner type.
Partner Subtype	Select a partner subtype.
Registration Dialog	Select the partner registration dialog that you want to associate with the partner program
Dialog Entry Point	Enter the point at which the dialog will fire. **Note.** You must identify a specific registration dialog in the previous field before you can select an entry point.
Description	Enter a summary description of the partner program.

Requirements

Choose all the partner requirements that you want to associate with this partner program.

Benefits

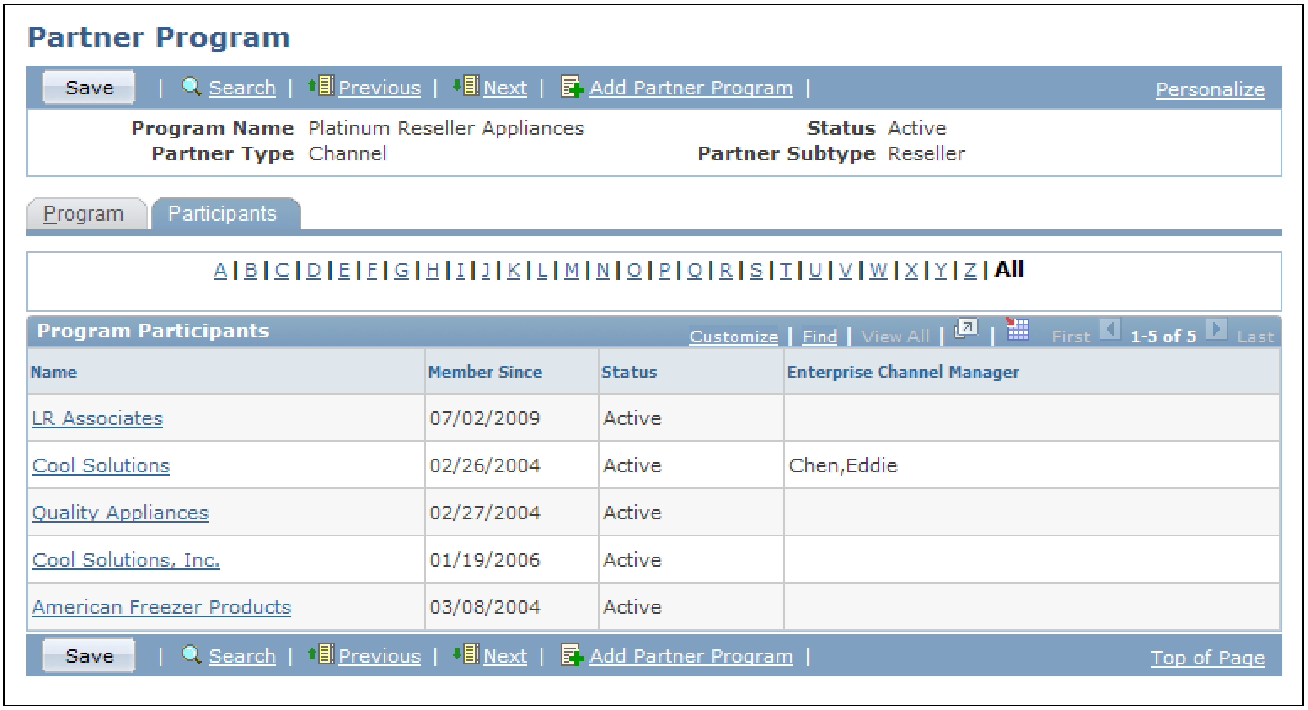
Choose all the partner benefits that you want to associate with this partner program.

Fees

Choose all the partner fees you want to associate to this partner program.

Viewing Partner Program Participants

Access the Partner Program - Participants page (Partners CRM, Add Partner Program, Partner Program, Participants).



Partner Program - Participants page

On this page, you can view the partner companies associated with this program. The alphabetical sorting search feature enables you to quickly identify partner companies. If you drill down into the partner company name, you will see a summary of that company. You can also add a partner company to this partner program.

Note. If you want to add an entirely new partner company to the CRM system, you must return to the Partner Company page.

Chapter 5

Creating and Maintaining Partner Profiles

This chapter provides an overview of partner profiles and discusses how to:

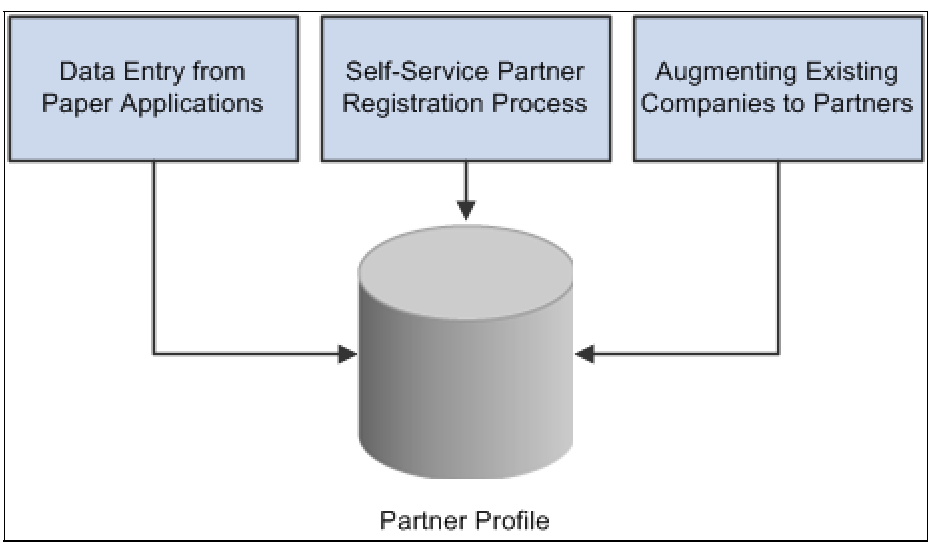
- Create and manage partner companies.
- Create and manage partner users.
- Add partner contacts.

Understanding Partner Profiles

As part of on going partner relationship management, the enterprise needs to be able to maintain the partner profile in the following scenarios:

- Add new partners.
- Update partner profile attributes.
- Terminate existing partners.
- Reactivate terminated partners.

This diagram illustrates the three data sources for a partner profile:



Creating Partner Profiles

Partner profile information is the center of the Partner Relationship Management universe. As part of the overall Partner Platform solution, the partner profile allows the Enterprise Channel Manager to manage profile data and allow other partner processes, such as application security and partner registration, to retrieve and update business object data. The Enterprise Channel Manager can create new partner profile data. New partner profiles can be created by the following means:

- Through the self-service registration process.

  In this case, the partner provides information over the web without action by the enterprise.

- Data entry from paper applications.

  In this case, an Enterprise Channel Manager would be responsible for manual data entry.

- Augmentation of an existing customer, meaning the adding of a Partner role.

  This privilege is only to the appropriate Enterprise Channel Manager(s), and is not accessible to all enterprise users. PeopleSoft CRM provides a facility for the Enterprise Channel Manager to create and maintain partner profile data.

Note. Quick Create functionality is disabled for the Partner Role Type. We do not allow Quick Create to create partner companies because enabling the feature would circumvent the standard partner registration approval process.

Partner Profile Terminology

Augmentation

This refers to adding a partner role to an existing company.

Business Object (BO)

Practically all objects in the PeopleSoft CRM Customer Data Model (or BORM) are considered business objects. There are three types of business objects:

1. Organization. (For example, a company, partner, or site)
2. Individual. (For example, a worker, consumer, or contact).
3. Other Database Object. (For example, an account).

Enterprise

This refers to the organization that is deploying PeopleSoft PRM. This is the PeopleSoft customer.

Enterprise Channel Administrator

Employee of the enterprise who is responsible for administering the Partner Relationship Management system. This could be the same role as the Enterprise Administrator, or the same role as the Enterprise Channel Manager, depending on the size of the Partner management organization. This role is slightly more technically-oriented because it involves an understanding of system setup and configuration for functions such as security and privileges.

Enterprise Channel Manager

Employee of the enterprise who is responsible for managing specific Partner relationships.

Enterprise Alliance Manager (EAM)	Enterprise Alliance Manager is another valid role that is similar to ECM. An EAM is someone who manages alliance partners.
Partner	An organization that sells products or services on behalf of the enterprise.
Partner Contact	A representative for the partner organization. This is usually an employee of the partner organization.
Partner Registration	This refers to the self-service facility that prospective partners use to apply to become enterprise partners.
Partner Relationship Administrator/Manager	Employee of the partner organization who is responsible for administering the relationship with the enterprise, or managing the relationship with the enterprise.
Partner Search	The business object search engine in PeopleSoft CRM allows users to search for partner business objects.

Creating and Managing Partner Companies

To create and manage partner companies, use the Add Partner Company (RD_PARTNER) component.

This section explains how to:

- View partner company information.
- Update partner company information.
- Enter market coverage information.
- View catalogs.
- Maintain competency, training, and certification information.
- View the partner company's access to customer data.
- View the partner company's sales organization tree.
- Maintain the partner company's customer references.
- Maintain resale tax certificate information.
- View partner program history.
- Maintain the account team assigned to the partner.
- Maintain partner-related tasks.
- View partner call reports.
- Maintain partner business plans.
- Enter and update partner company notes.

- Maintain partner company contacts.
- Maintain partner company address, phone, and email information.
- View and maintain partner relationships.
- Maintain marketing profile information.

Pages Used to Create and Manage Partner Companies

Page Name	***Definition Name***	***Navigation***	***Usage***
Partner Company - Summary	RD_PARTNER_SUMMARY	Partners CRM, Search Partner Company, Partner Company, Summary, Summary	View a summary of partner company information.
Partner Company - Summary: Details	RD_PARTNER_DETAILS	• Partners CRM, Add Partner Company, Partner Company, Summary, Details • Partners CRM, Search Partner Company, Partner Company, Summary Click the Details link.	Update general partner company information.
Partner Company - Summary: Market Coverage	RD_PTNR_MARKET	• Partners CRM, Add Partner Company, Partner Company, Summary Click the Market Coverage link. • Partners CRM, Search Partner Company, Partner Company, Summary Click the Market Coverage link.	Enter market coverage information that describes the target market that the partner services.

Page Name	***Definition Name***	***Navigation***	***Usage***
Partner Company - Summary: Products	RD_PTNR_PRODUCTS	• Partners CRM, Add Partner Company, Partner Company, Summary Click the Products link. • Partners CRM, Search Partner Company, Partner Company, Summary Click the Products link.	View catalogs to which the partner has access.
Partner Company - Summary: Expertise	RD_PTNR_EXPERTISE	• Partners CRM, Add Partner Company, Partner Company, Summary Click the Expertise link. • Partners CRM, Search Partner Company, Partner Company, Summary Click the Expertise link.	Maintain competency, training, and certification information.
Partner Company - Summary: Security	RD_PTNR_SECURITY	• Partners CRM, Add Partner Company, Partner Company, Summary Click the Security link. • Partners CRM, Search Partner Company, Partner Company, Summary Click the Security link.	View the partner company's access to customer data.

Page Name	*Definition Name*	*Navigation*	*Usage*
Partner Company - Summary: Organization	RD_PTNR_ORG	• Partners CRM, Add Partner Company, Partner Company, Summary Click the Organization link. • Partners CRM, Search Partner Company, Partner Company, Summary Click the Organization link.	View the partner company's sales organization tree.
Partner Company - Summary: References	RD_PTNR_REFERENCES	• Partners CRM, Add Partner Company, Partner Company, Summary Click the References link. • Partners CRM, Search Partner Company, Partner Company, Summary Click the References link.	Maintain the partner company's references from customers.
Partner Company - Summary: Tax Exemption	RD_PTNR_TAX_EXEMPT	• Partners CRM, Add Partner Company, Partner Company, Summary Click the Tax Exemption link. • Partners CRM, Search Partner Company, Partner Company, Summary Click the Tax Exemption link.	Maintain resale tax certificate information.

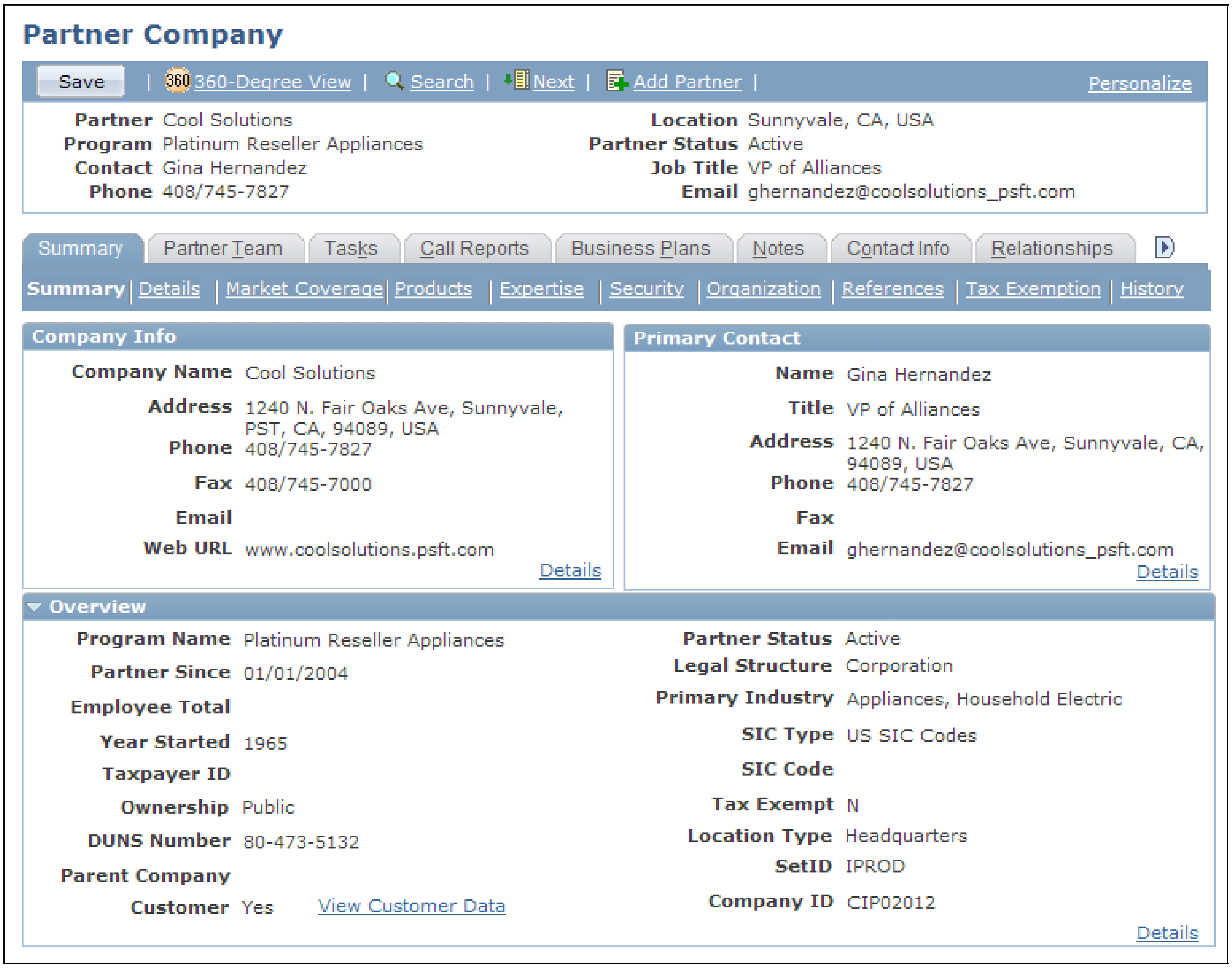
Page Name	***Definition Name***	***Navigation***	***Usage***
Partner Company - Summary: History	RD_PTNR_HISTORY	• Partners CRM, Add Partner Company, Partner Company, Summary Click the History link. • Partners CRM, Search Partner Company, Partner Company, Summary Click the History link.	View the partner program history for the partner company.
Partner Company - Partner Team	RD_ACCOUNT_TEAM	• Partners CRM, Add Partner Company, Partner Company, Partner Team • Partners CRM, Search Partner Company, Partner Company, Partner Team	Maintain the account team that is assigned to the partner.
Partner Company - Tasks	RD_TASK_LIST	• Partners CRM, Add Partner Company, Partner Company, Tasks • Partners CRM, Search Partner Company, Partner Company, Tasks	Maintain tasks that are related to the partner.
Partner Company - Call Reports	RD_CALLRPT_LST_TXN	• Partners CRM, Add Partner Company, Partner Company, Call Reports • Partners CRM, Search Partner Company, Partner Company, Call Reports	View call reports for the partner.
Partner Company - Business Plans	RD_ACCOUNT_PLAN	• Partners CRM, Add Partner Company, Partner Company, Business Plans • Partners CRM, Search Partner Company, Partner Company, Business Plans	Maintain partner company business plans.

Page Name	***Definition Name***	***Navigation***	***Usage***
Partner Company - Notes	RD_NOTES	• Partners CRM, Add Partner Company, Partner Company, Notes • Partners CRM, Search Partner Company, Partner Company, Notes	Enter and update partner company notes.
Partner Company - Contact Info - Contacts	RD_PTNR_CONTACTS	• Partners CRM, Add Partner Company, Partner Company, Contact Info Click the Contacts link. • Partners CRM, Search Partner Company, Partner Company, Contact Info Click the Contacts link.	Maintain partner company contacts.
Partner Company - Contact Info - Partners	RD_PTNR_ADDR_BOOK	• Partners CRM, Add Partner Company, Partner Company, Contact Info Click the Partner link. • Partners CRM, Search Partner Company, Partner Company, Contact Info Click the Partner link.	Maintain partner company address, phone, and email information.
Partner Company - Relationships	RD_COMPANY_REL	• Partners CRM, Add Partner Company, Partner Company, Relationships • Partners CRM, Search Partner Company, Partner Company, Relationships	View and maintain partner relationships.

Page Name	***Definition Name***	***Navigation***	***Usage***
Partner Company - More Info	RD_PROFILE	• Partners CRM, Add Partner Company, Partner Company, More Info • Partners CRM, Search Partner Company, Partner Company, More Info	Maintain marketing profile information.
Partner Company - Attributes	RB_ATTR_RUN_PTNR	• Partners CRM, Add Partner Company, Partner Company, Attributes • Partners CRM, Search Partner Company, Partner Company Attributes	Maintain partner attributes.

Viewing Partner Company Information

Access the Partner Company - Summary page (Partners CRM, Search Partner Company, Partner Company, Summary, Summary).



Partner Company - Summary page

Company Info

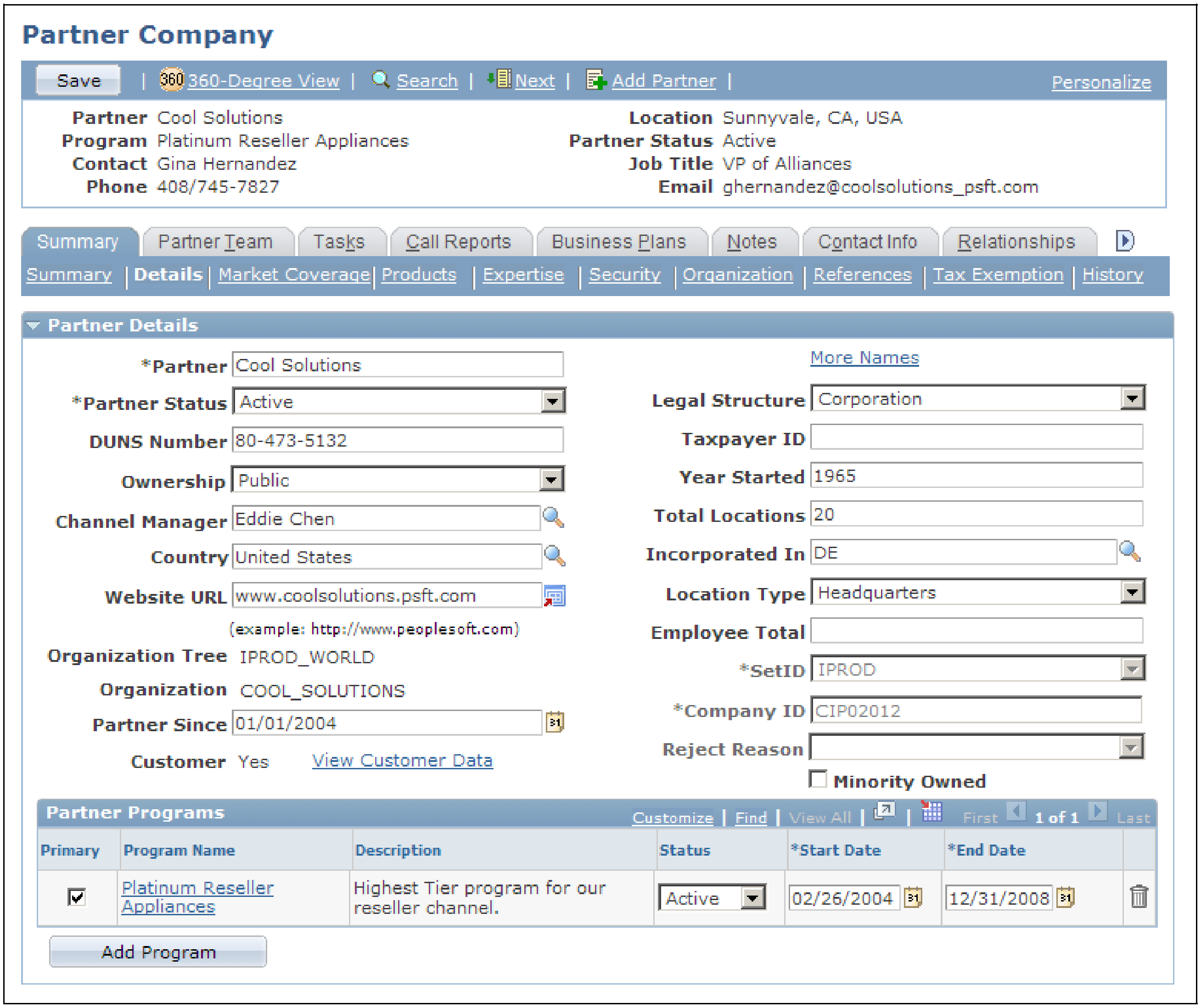
View all relevant company data.

See Also

PeopleSoft CRM 9.1 Business Object Management PeopleBook, "Defining Company Business Objects"

Updating Partner Company Information

Access the Partner Company - Summary: Details page (Partners CRM, Add Partner Company, Partner Company, Summary, Details).



Partner Company - Summary: Details page

The Partner Program is linked to the partner on this page. The partner must be linked to an active program in order to save the page.

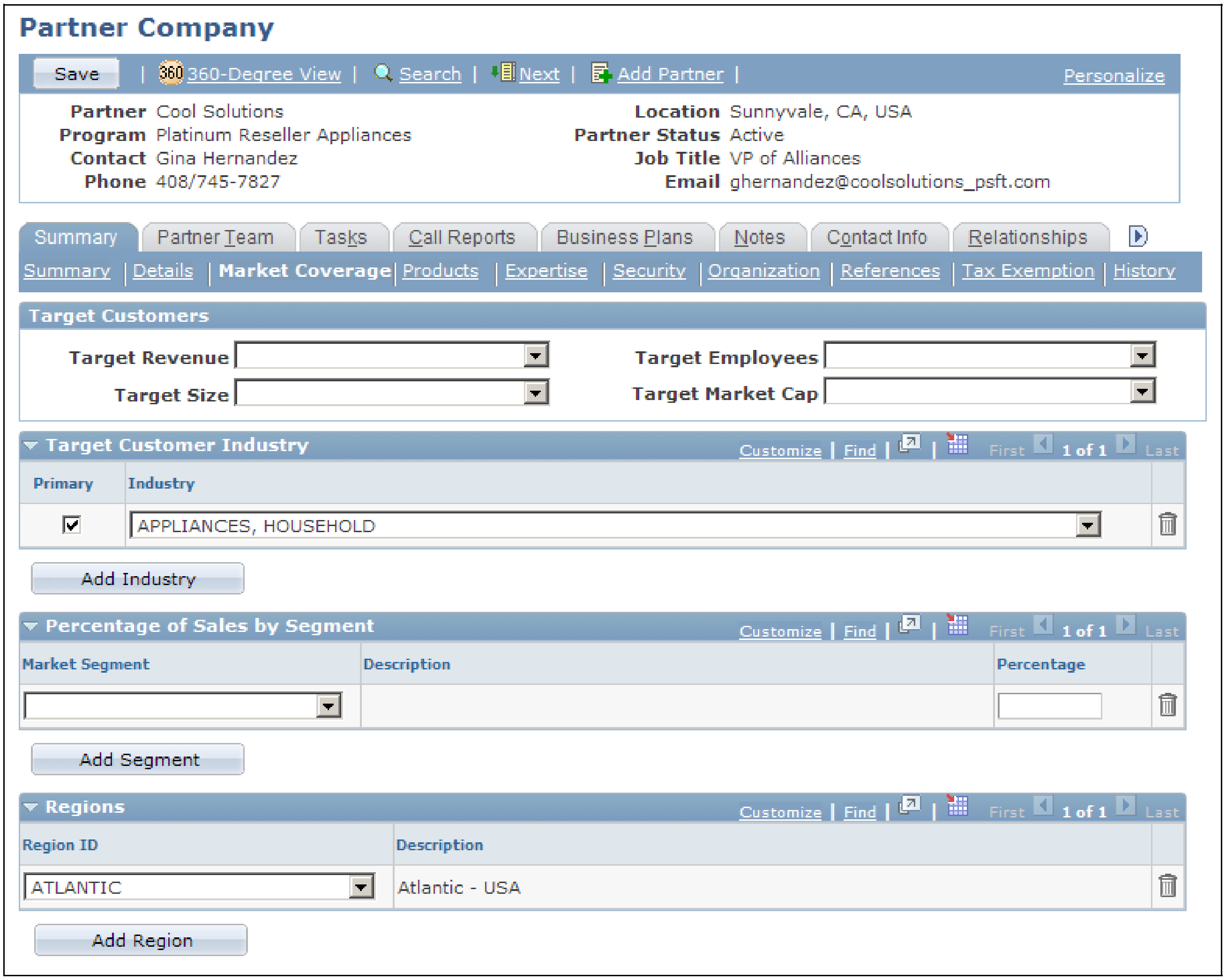
Partner and **Program** These fields are required fields for the partner.

See Also

PeopleSoft CRM 9.1 Business Object Management PeopleBook, "Defining Company Business Objects"

Entering Market Coverage Information

Access the Partner Company - Summary: Market Coverage page (click the Market Coverage link on the Partner Company - Summary page).



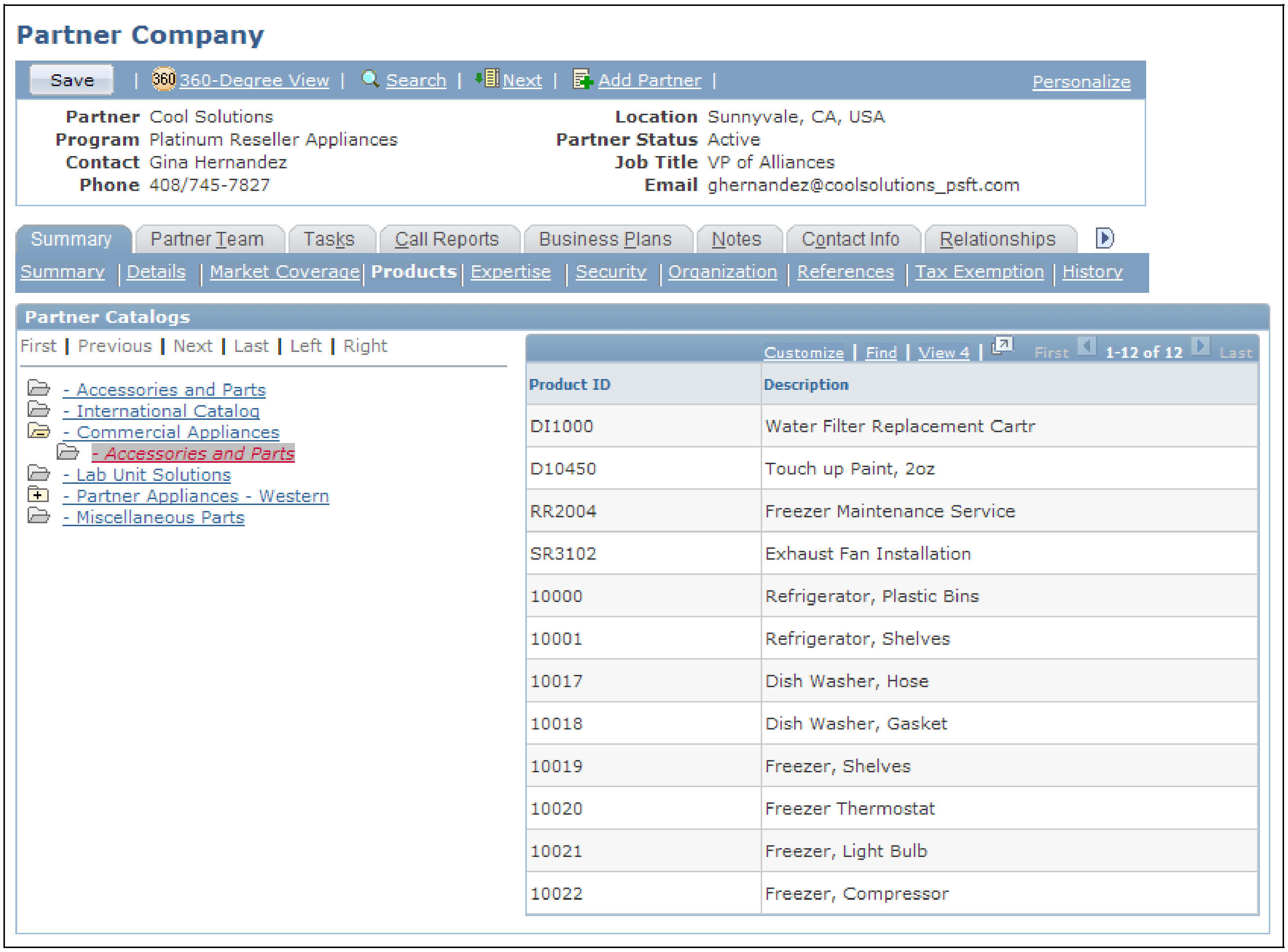
Partner Company - Summary: Market Coverage page

See Also

PeopleSoft CRM 9.1 Business Object Management PeopleBook, "Defining Company Business Objects"

Viewing Catalogs

Access the Partner Company - Summary: Products page (click the Products link on the Partner Company - Summary page).



Partner Company - Summary: Products page

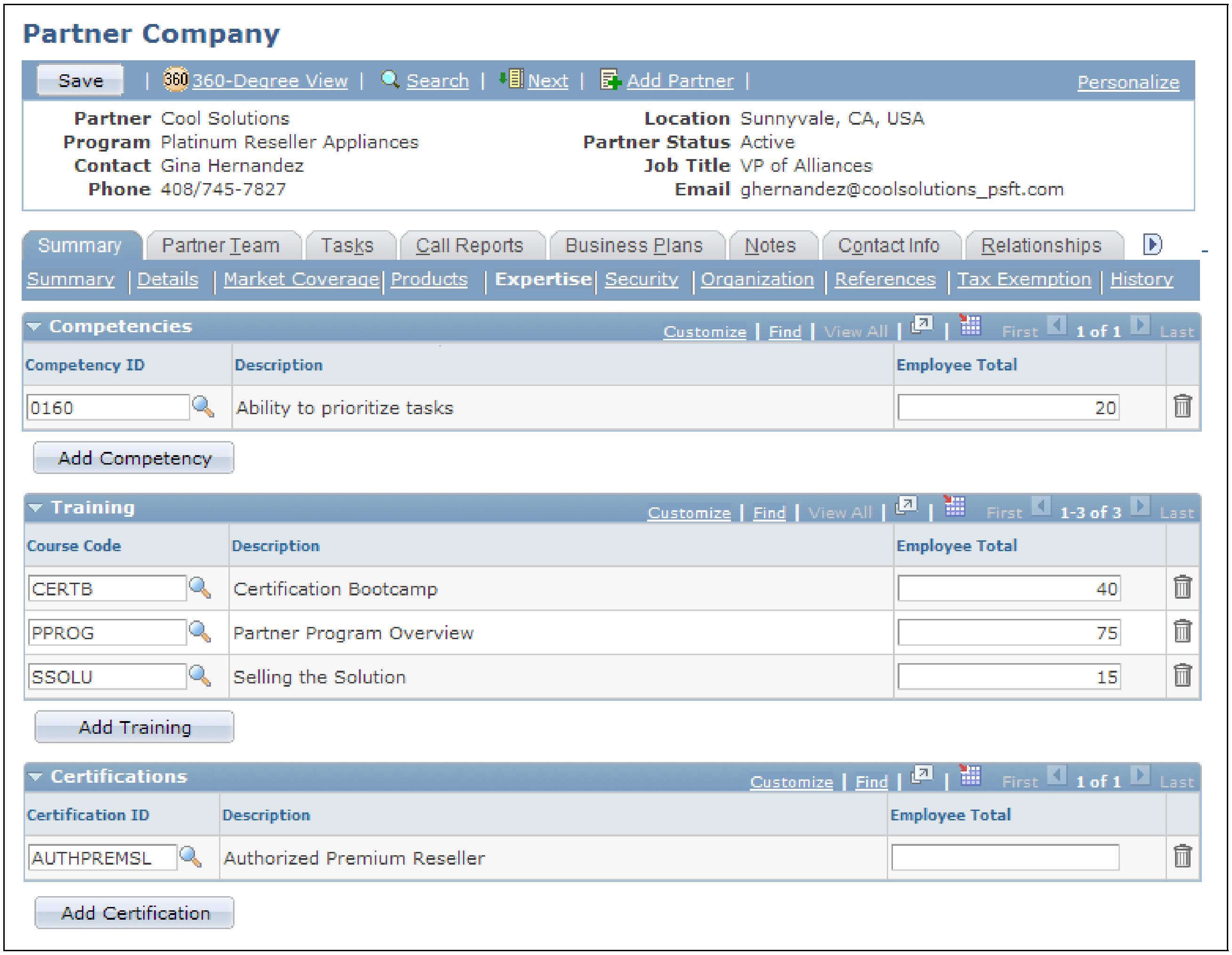
Note. PeopleSoft CRM application security determines the list of catalogs. All catalogs that any of the partner's users can view are displayed.

See Also

PeopleSoft CRM 9.1 Order Capture Applications PeopleBook, "Understanding Product, Pricing, Proration, and Catalogs," Catalog Setup

Viewing Competency, Training, and Certification Information

Access the Partner Company - Summary: Expertise page (click the Expertise link on the Partner Company - Summary page).



Partner Company - Summary: Expertise page

See Also

PeopleSoft CRM 9.1 Business Object Management PeopleBook, "Defining Company Business Objects"

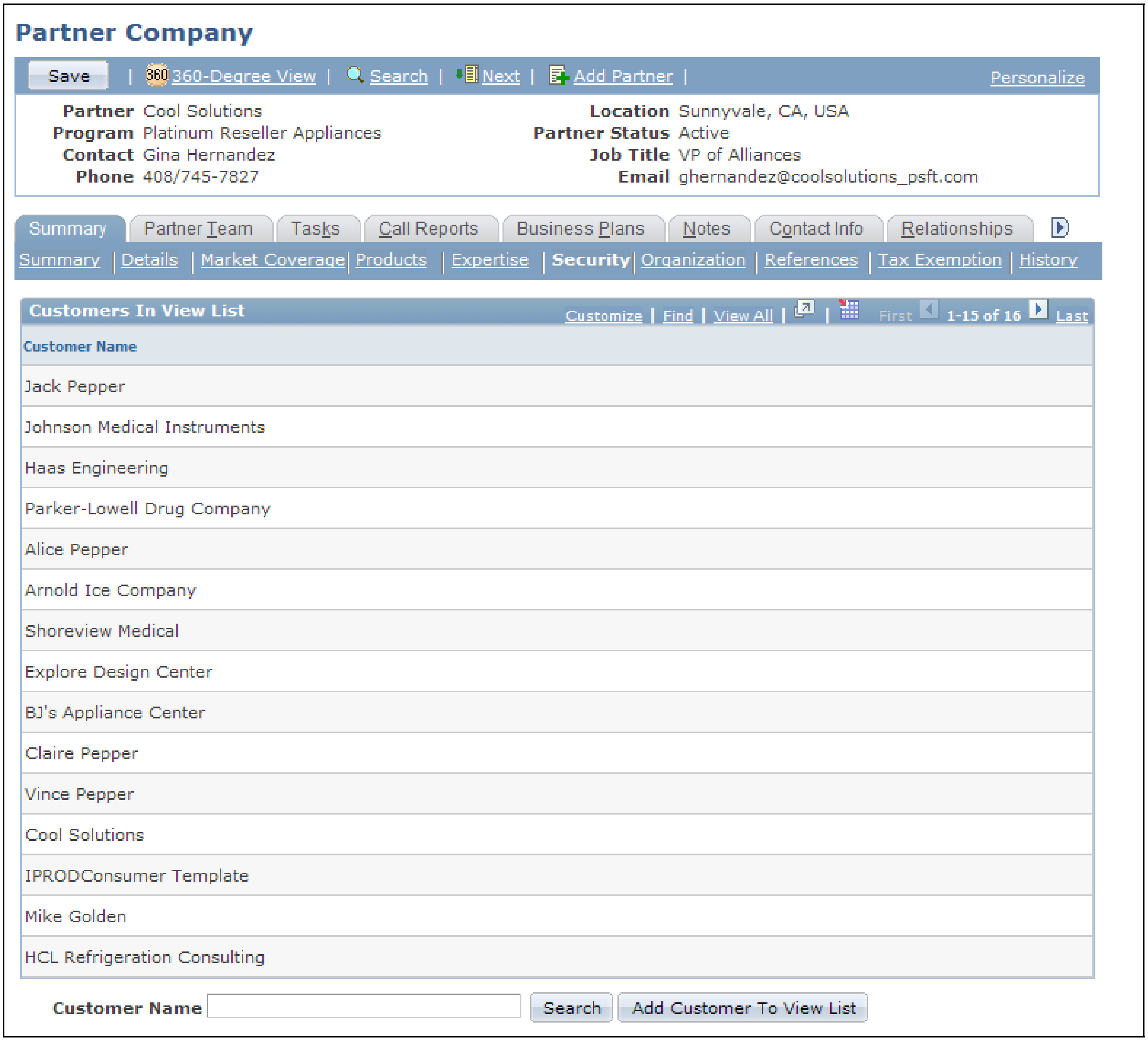
Viewing Partner Access to Customer Data

Access the Partner Company - Summary: Security page (click the Security link on the Partner Company - Summary page).

Customers in View List is the net customer list that the Partner has access due to static and dynamic view lists and security profiles.

Search button enables searching for the Customers that the Partner is authorized to view.

Add Customer To View List enables authorizing the Partner to an explicit list of Customers or named accounts.



Partner Company - Summary: Security page (1 of 2)

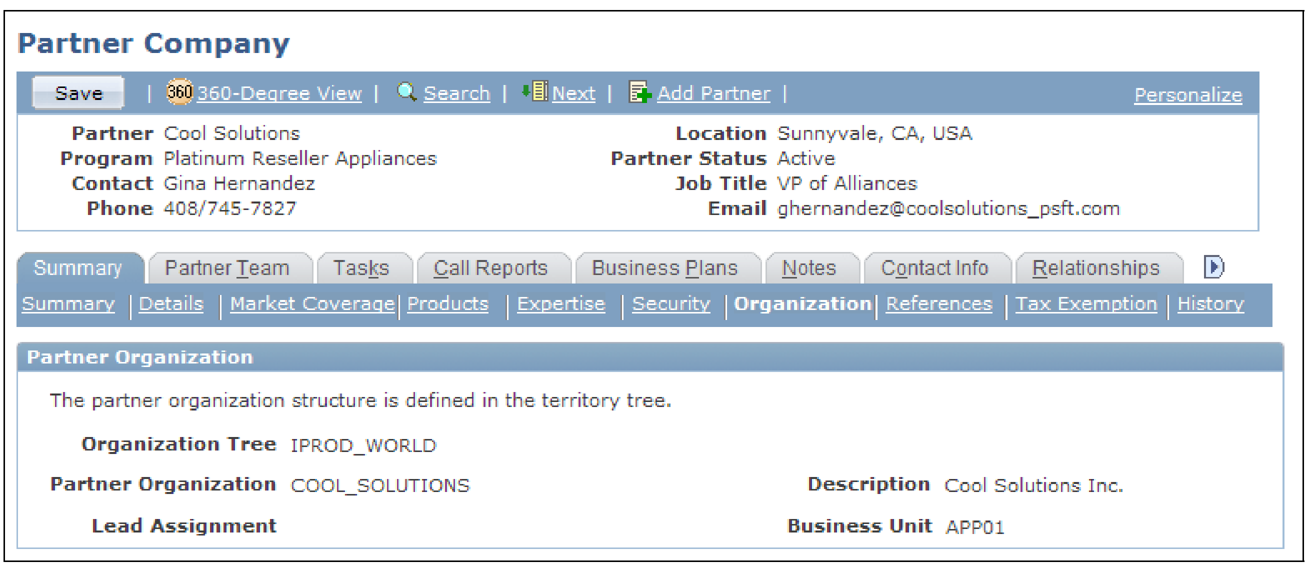
Partner Company - Summary: Security page (2 of 2)

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Setting Up Security and User Preferences"

Viewing the Partner Company's Sales Organization Tree

Access the Partner Company - Summary: Organization page (click the Organization link on the Partner Company - Summary page).



Partner Company - Summary: Organization page

The options for creating a partner organization are based on the business unit for the parent organization and the setID for the partner.

When the partner organization is created, the business unit and lead assignment group are copied from the parent organization. The subordinate organizations displayed are restricted to the immediate child organizations of the partner organization.

See Also

PeopleSoft Sales 9.1 PeopleBook, "Working with Territories and Assignment Groups"

Viewing the Partner's Customer References

Access the Partner Company - Summary: References page (click the References link on the Partner Company - Summary page).

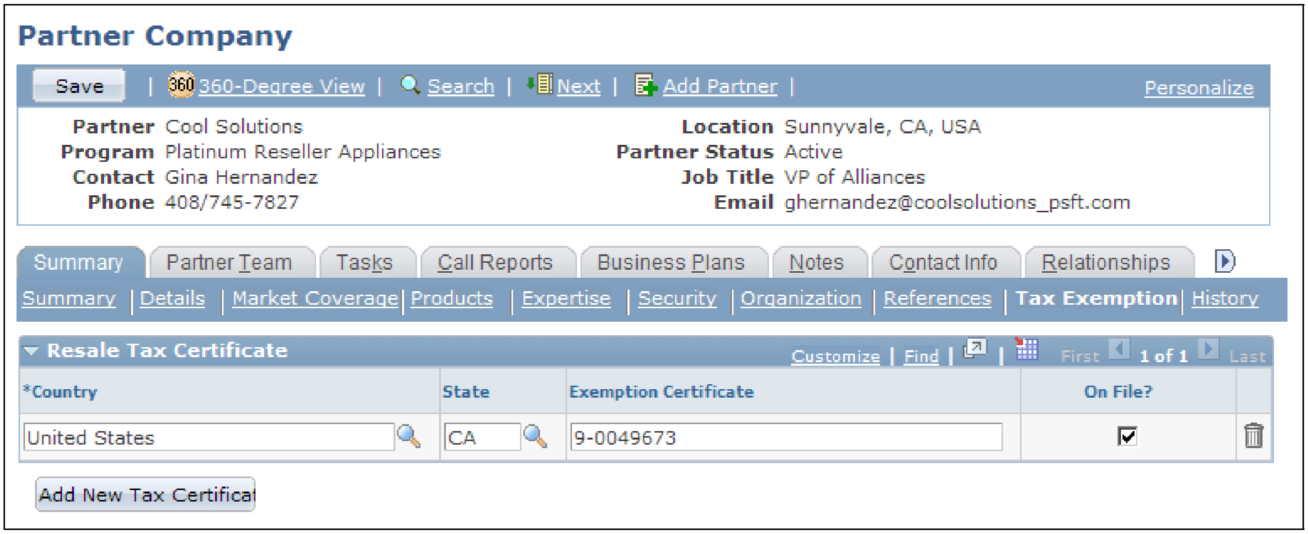
Partner Company - Summary: References

See Also

PeopleSoft CRM 9.1 Business Object Management PeopleBook, "Defining Company Business Objects"

Viewing Resale Tax Certificates

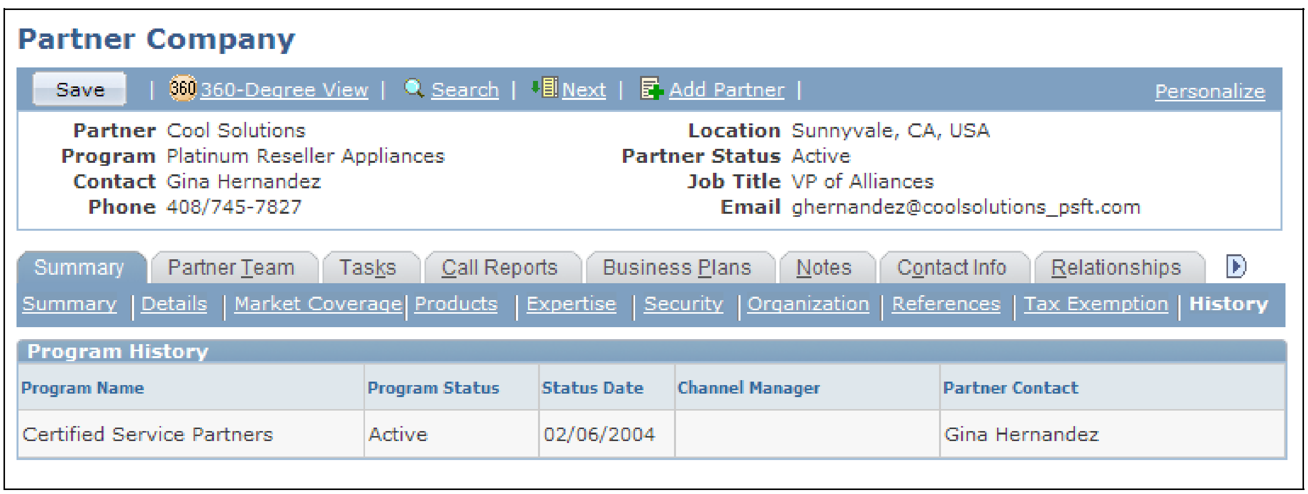
Access the Partner Company - Summary: Tax Exemption page (click the Tax Exemption link on the Partner Company - Summary page).



Partner Company - Summary: Tax Exemption page

Viewing Partner Program History

Access the Partner Company - Summary: History page (click the History link on the Partner Company - Summary page).

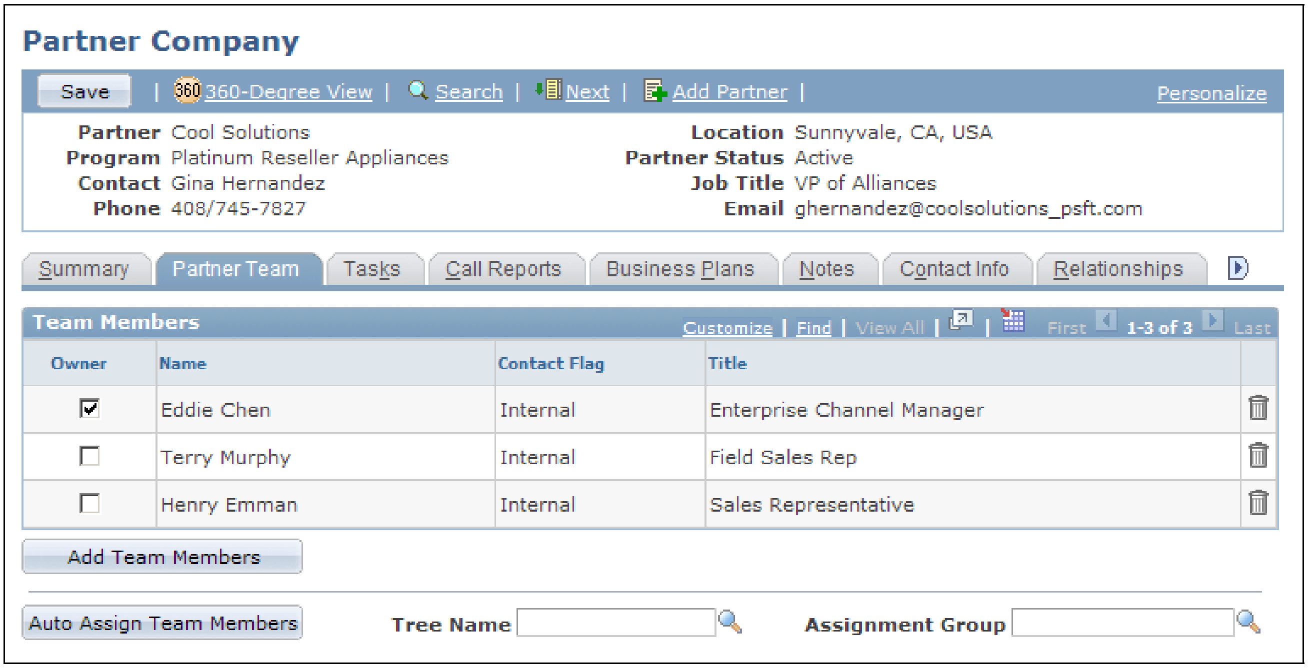


Partner Company - Summary: History page

This page displays the partner's history as it relates to the various programs that they have participated in.

Maintaining the Account Team Assigned to the Partner

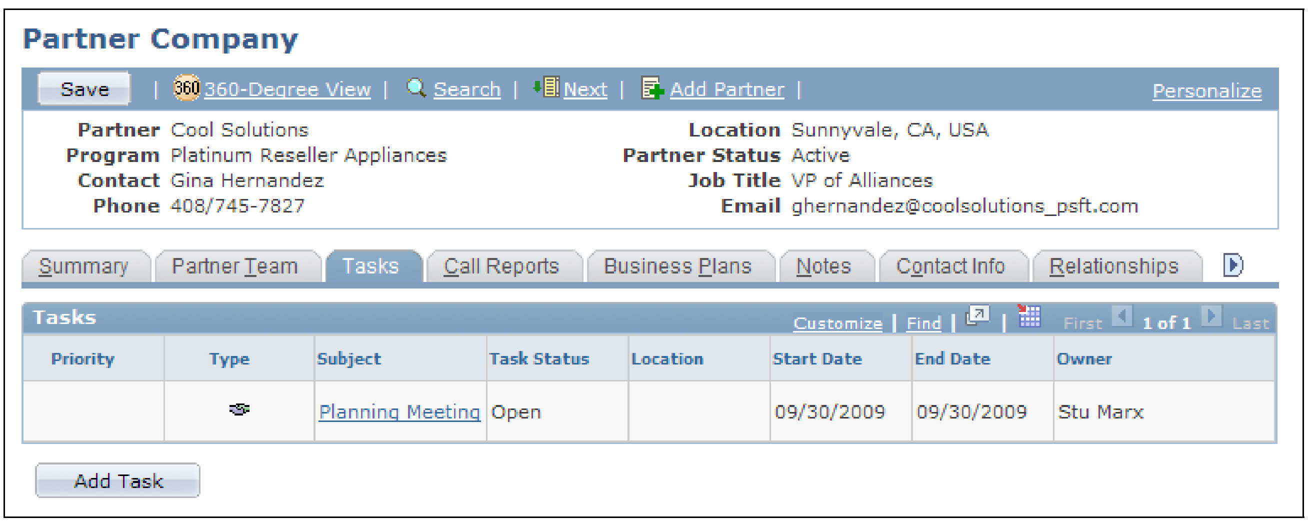
Access the Partner Company - Partner Team page (Partners CRM, Add Partner Company, Partner Company, Partner Team).



Partner Company - Partner Team page

Maintaining Partner-Related Tasks

Access the Partner Company - Tasks page (Partners CRM, Add Partner Company, Partner Company, Tasks).

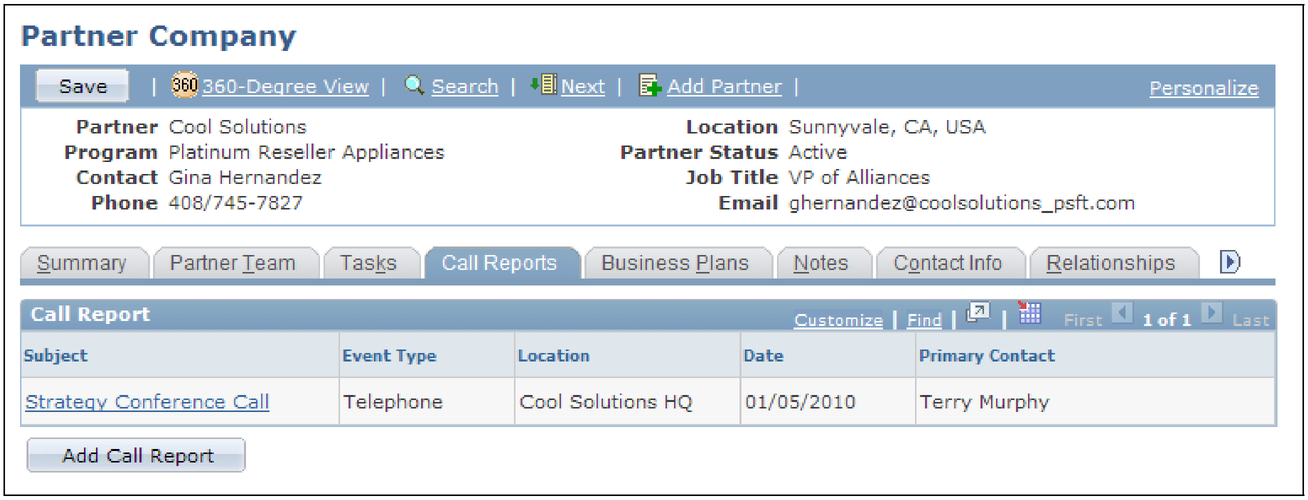


Partner Company - Tasks page

See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Working with Tasks."

Viewing Partner Call Reports

Access the Partner Company - Call Reports page (Partners CRM, Add Partner Company, Partner Company, Call Reports).

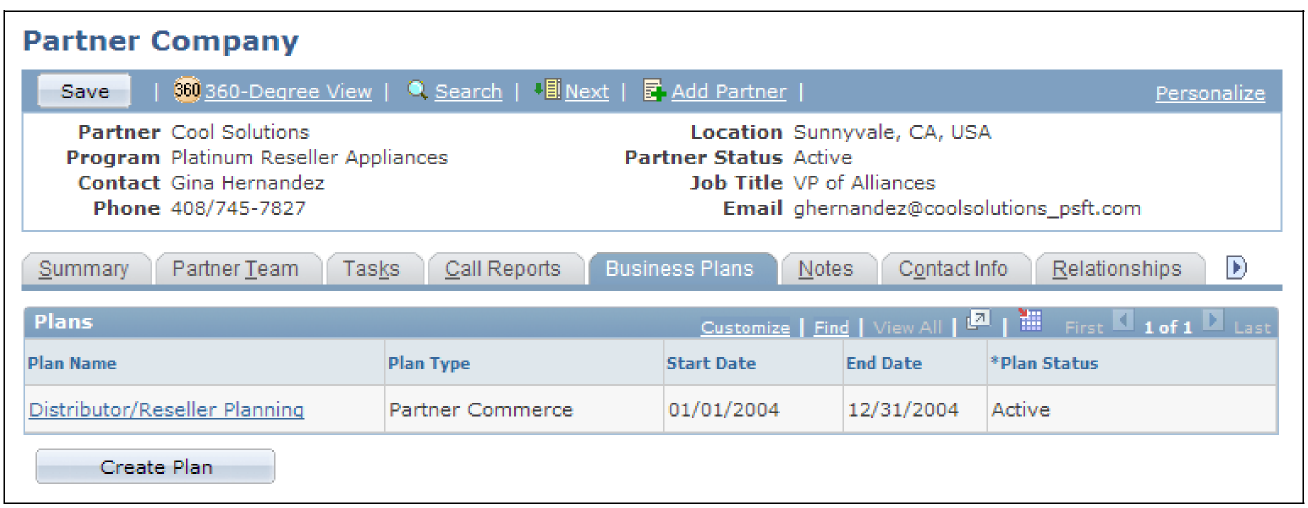


Partner Company - Call Reports page

See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Working with Call Reports."

Maintaining Partner Business Plans

Access the Partner Company - Business Plans page (Partners CRM, Add Partner Company, Partner Company, Business Plans).

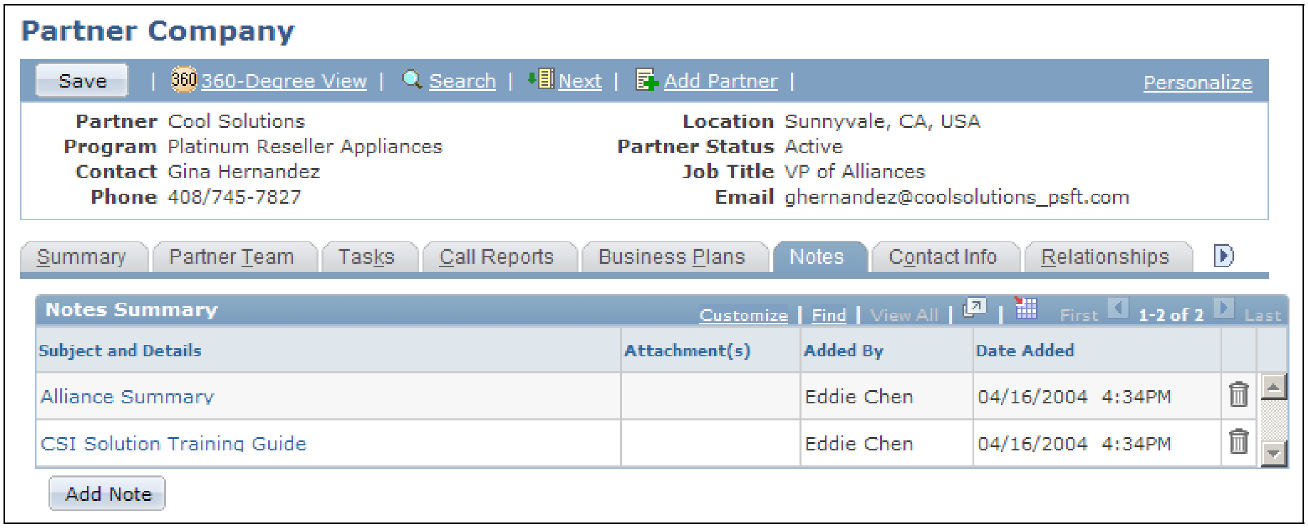


Partner Company - Business Plans page

See and *PeopleSoft Strategic Account Planning 9.1 PeopleBook*, "Creating Account Plans."

Entering and Updating Partner Company Notes

Access the Partner Company - Notes page (Partners CRM, Add Partner Company, Partner Company, Notes).

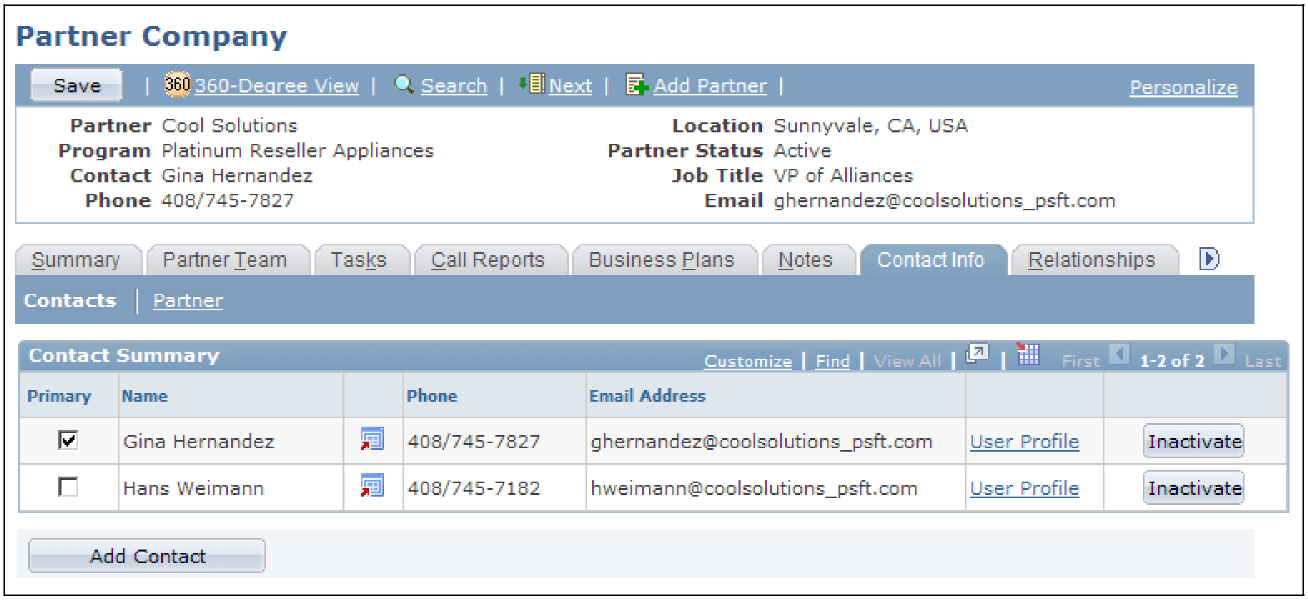


Partner Company - Notes page

See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Working with Notes and Attachments."

Maintaining Partner Company Contacts

Access the Partner Company - Contact Info: Contacts page (Partners CRM, Add Partner Company, Partner Company, Contact Info).



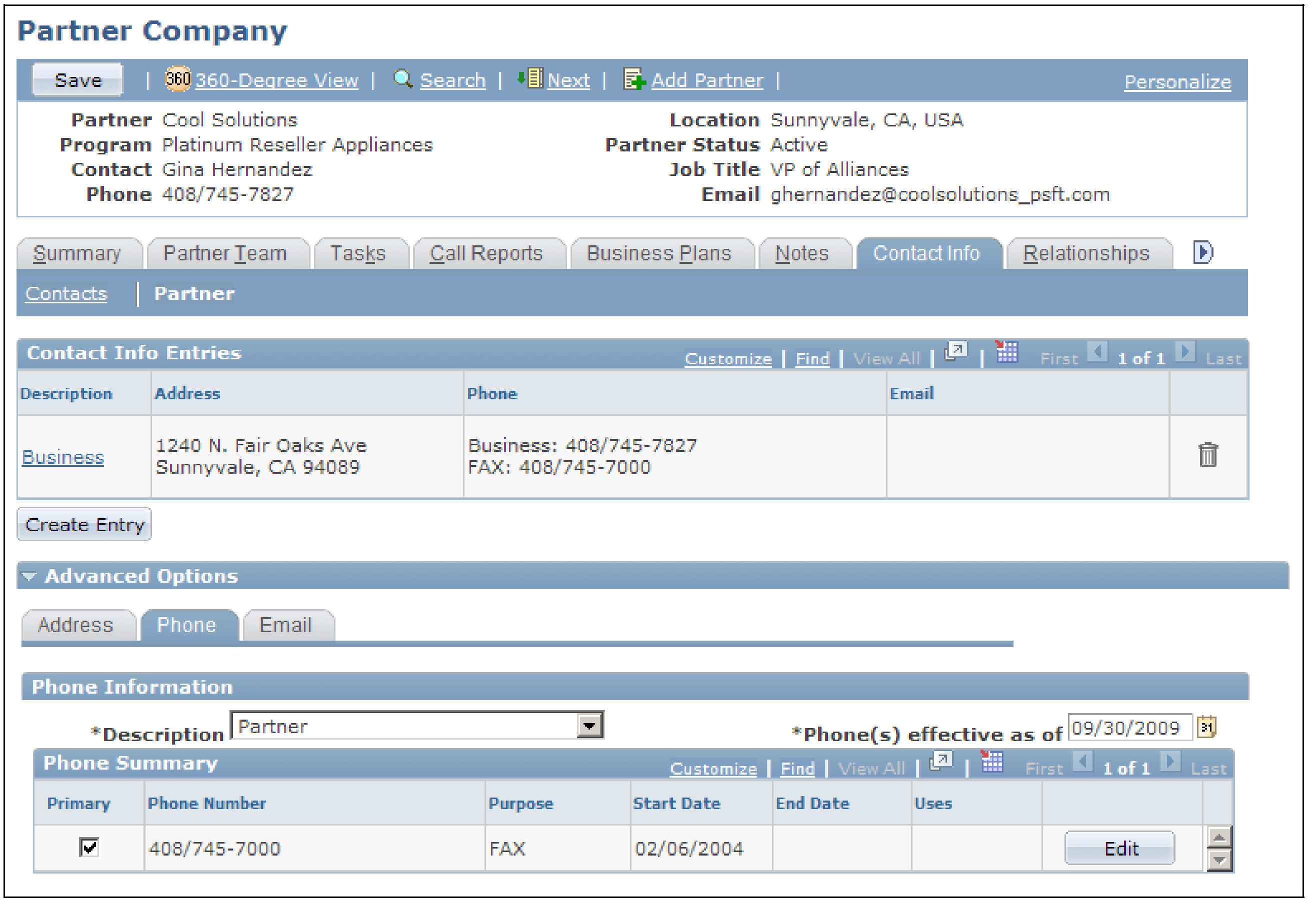
Partner Company - Contact Info: Contacts page

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Working with Contacts"

Maintaining Partner Company Address, Phone, and Email Information

Access the Partner Company - Contact Info: Partner page (Partners CRM, Add Partner Company, Partner Company, Contact Info).



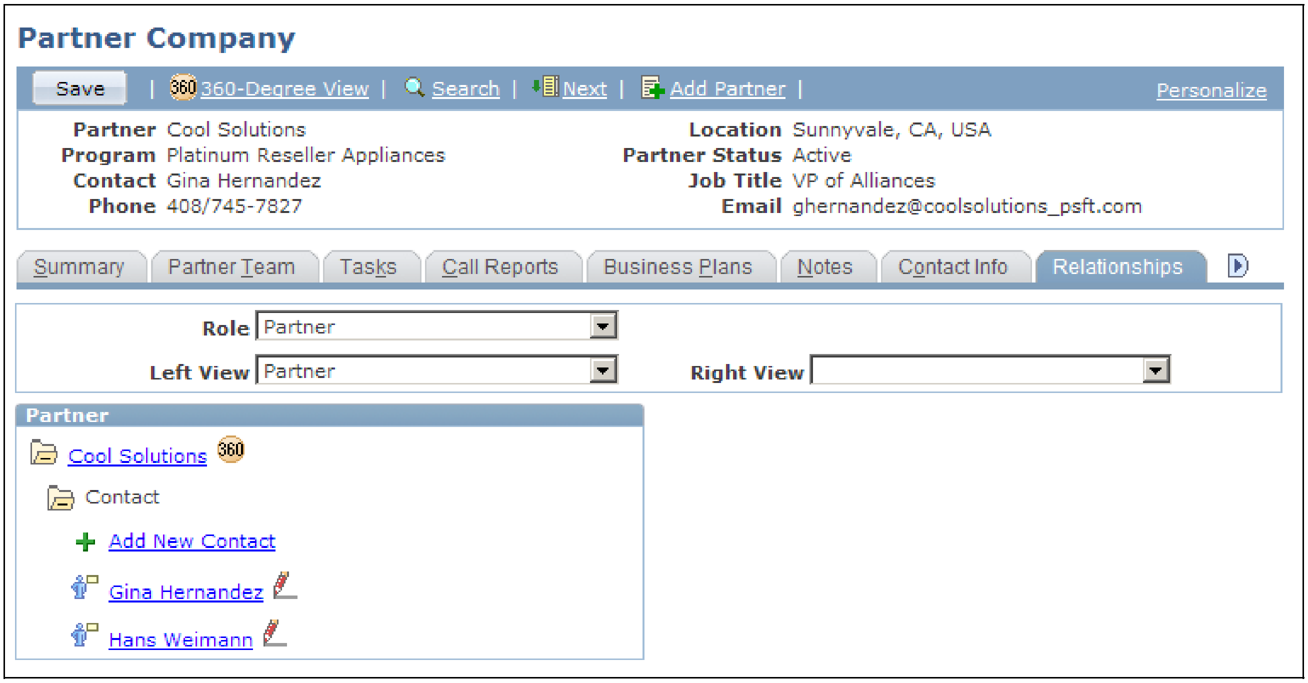
Partner Company - Contact Info: Partner page

See Also

PeopleSoft CRM 9.1 Business Object Management PeopleBook, "Defining Person Business Objects," Defining Information for Business Contacts

Viewing and Maintaining Partner Relationships

Access the Partner Company - Relationships page (Partners CRM, Add Partner Company, Partner Company, Relationships).



Partner Company - Relationships page

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Working with Contacts"

Maintaining Marketing Profile Information

Access the Partner Company - More Info page (Partners CRM, Add Partner Company, Partner Company, More Info).

Maintaining Partner Company Attributes

Access the Partner Company - Attributes page (Partners CRM, Add Partner Company, Partner Company, Attributes).

See and *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Attributes."

Creating and Managing Partner Users

This section provides an overview and explains how to manage:

- Partner user information.
- Organization groups for partners.

- Additional roles for partners.

Understanding Partner Management

The User Information and Organization Group pages are used to manage the organization structure and lead assignment for the partner. The sales tree controls the organization group that the partner can be assigned to.

Additional trees can be added by performing the following:

1. Adding additional sales territory trees from the Tree Manager page.

   Note. The appropriate security must be set up in order to add trees.

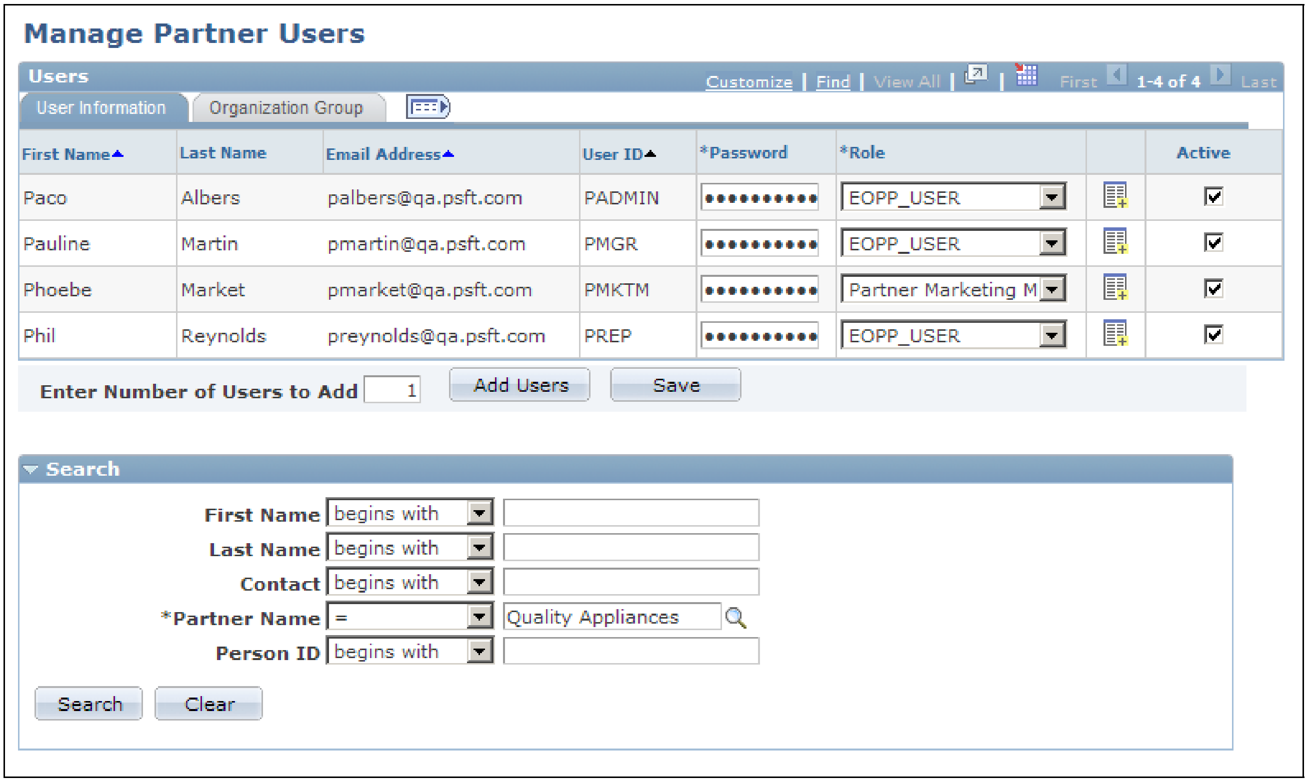
2. Add the new tree for the user on the Organization Groups page.

Pages Used to Manage Partners

Page Name	***Definition Name***	***Navigation***	***Usage***
Manage Partner Users - User Information	RD_PTNR_USER_SRCH	Partners CRM, Manage Partner Users, Manage Partner Users, User Information	Use to add partners.
Manage Partner Users - Organization Group	RD_PTNR_USER_SRCH	Partners CRM, Manage Partner Users, Manage Partner Users, Organization Group	Use to organization groups for the partner.
Additional Roles	RD_PTNR_USER_ROLES	Click the Additional Roles button on the Manage Partner Users — User Information page.	Use to add more then one role for the partner.

Managing Partner User Information

Access the User Information page (Partners CRM, Manage Partner Users, Manage Partner Users, User Information).



User Information page

Role

This is used to determine what the partner can do.

Additional Roles

Additional roles can be added by clicking the button.

Note. Roles can only be deleted from the Additional Roles page. Changing the role will add additional roles, but not delete the previously assigned role.

Add Users

Click the button to add additional users for the partner.

Save

Click the button to save new users for the partner.

Search

Partner Name

This is a required field for the search. Use the other fields to limit the search.

Managing Organization Groups for Partners

Access the Organization Group page (Partners CRM, Manage Partner Users, Manage Partner Users, Organization Group).

Organization Group The options available for the user are controlled by the Organization Tree.

Group Owner Select the user that you want to be the primary owner for the group.

Adding Additional Roles for Partners

Access the Additional Roles page (click the Additional Roles button on the Manage Partner Users - User Information page.

Role Name All of the roles display for the user. Use the Add and Delete buttons to add or remove roles for the user.

Adding Partner Contacts

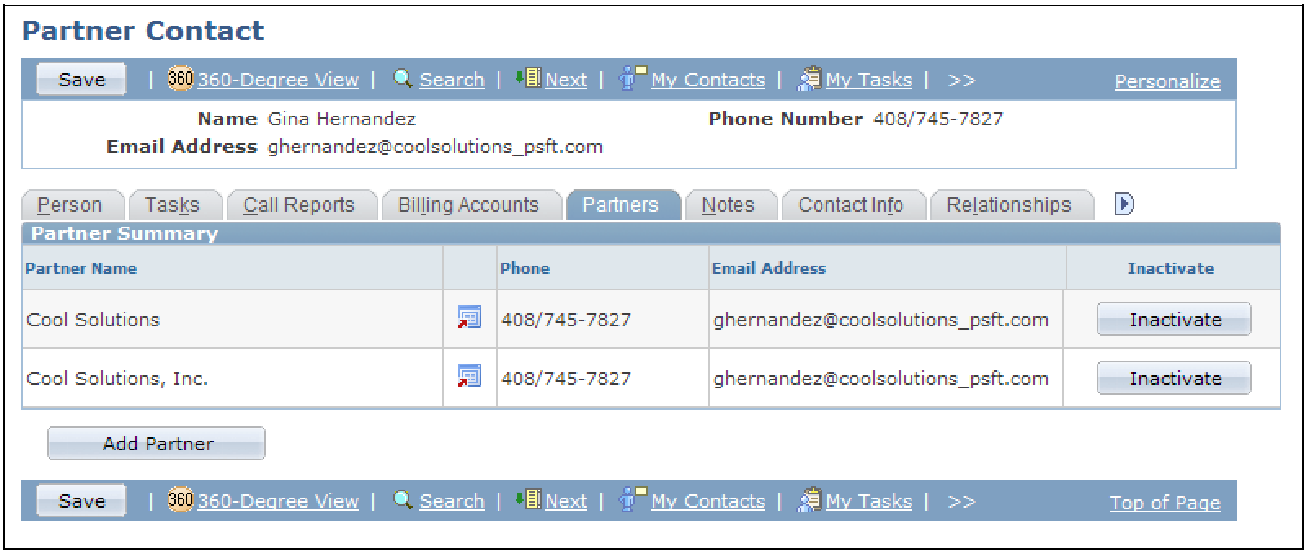
This section explains how to add partner contacts.

Pages Used to Add Contacts

Page Name	*Definition Name*	*Navigation*	*Usage*
Partner Contact - Partners	RD_PRSN_PARTNERS	Partners CRM, Add Partner Contact, Partner Contact, Partners	Add a partner contact

Adding a Partner Contact

Access the Partner Contact component - Partners page (Partners CRM, Add Partner Contact, Partner Contact, Partners).



Partner Contact - Partners page

Adding a partner contact is similar to adding any other contact in PeopleSoft CRM. This page is the only unique page when you want to add a partner contact. Be sure to fill out all of the pages. The information is stored in the PeopleSoft Customer Data Model.

See Also

PeopleSoft CRM 9.1 Business Object Management PeopleBook, "Defining Company Business Objects," Defining Company Contacts

Chapter 6

Setting Up Security for Partners

This chapter identifies new security terminology relevant to PeopleSoft Partner Relationship Management (PRM), provides an overview of PRM security, and discusses how to:

- Understand transaction security as applied to PRM.
- Understand and set up PeopleSoft CRM application security for PRM.

PRM Security Terminology

Transaction — A primary business activity such as campaigns, cases, leads, opportunities, orders, and service orders.

Configurable Search — A transaction search page with a common interface that is shared across all CRM transactions. A system administrator can configure the relevant search fields for each transaction. Configurable Searches can use dataset definitions for achieving row-level security in the search results.

Functional Options — A unique code that defines a specific action or privilege that can be performed within a transaction or component. For example, a single functional option could control whether a partner can add a customer address.

Functional Option Group — A grouping of function options. A partner can maintain orders, can add customers, and view customer addresses.

Membership List — A dynamically or statically defined group of people—for example partner contacts—whose functional and data access needs to be secured.

View List — A dynamically or statically defined group of objects—for example, customers, accounts—that are being secured for viewing by the Membership List. For example, all Fortune 500 companies in the North America

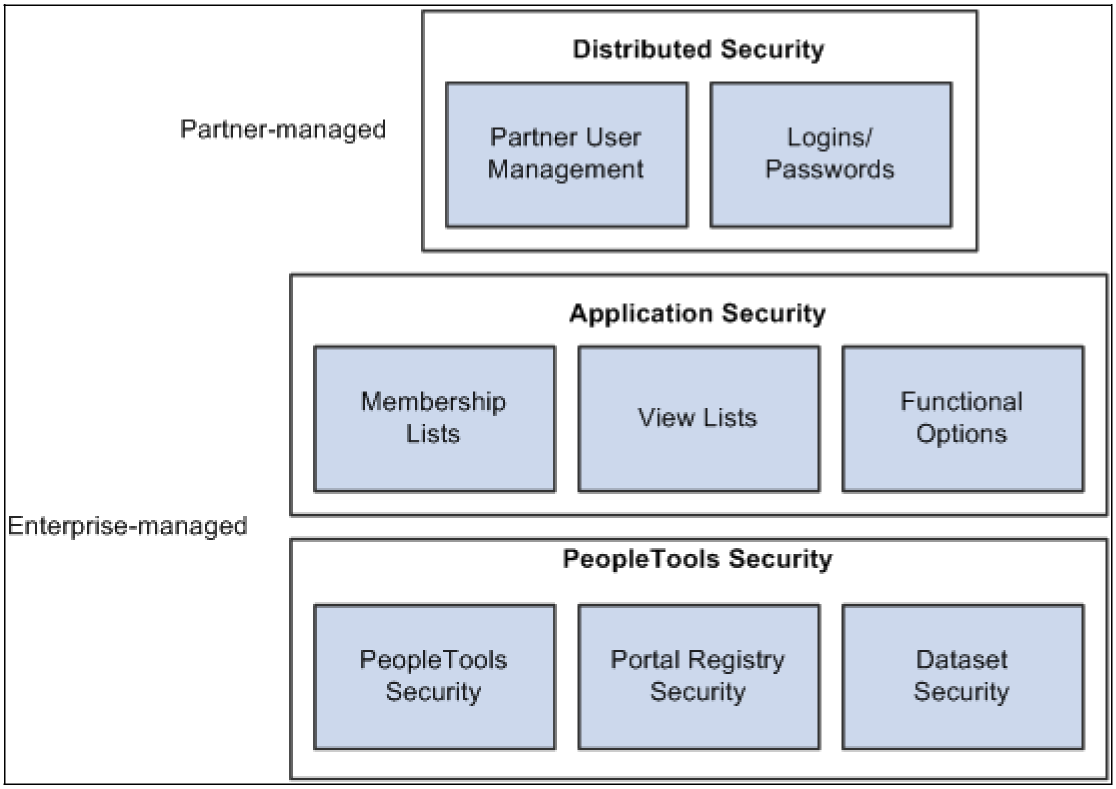
Security Profile — A logical security container that groups the view lists and functional privileges that can be granted to a membership list. A security profile is given to one or multiple membership lists. An example would be all partners in the gold program (membership list) have access to Fortune 500 companies (view list) with the ability to *maintain orders* and *add customer addresses* (functional options).

Overview of Security as Applied to Partner Relationship Management

One of the foundational components of the PeopleSoft Partner Relationship Management (PRM) Solution is security. Security is a combination of transaction (or PeopleTools) security, application security, and distributed security (for partner users). Transaction security includes the menu navigation and component access achieved through a combination of the existing PeopleSoft portal navigation security, PeopleTools component security, and dataset security frameworks. PeopleTools security provides a mechanism to control PIA menu navigation access through Portal Security, Permission Lists and user roles. Application security includes securing data, prompts, and functions within a transaction. Dataset security controls row-level access to transactions, and is achieved by associating the definition of a dataset to the Configurable Search definition for a transaction that has multiple dataset rules. Dataset rules will be assigned to PeopleTools Roles.

PeopleSoft Partner Relationship Management provides for the most stringent requirements for securing partner access to transactions and customer data. You need to define role-based and characteristics-based security. This includes the transactions that can be accessed, the transaction rows that should be accessible, the customers that can be seen by the partner, and what the partner can do within the general transaction or transaction row. PeopleSoft PRM also requires that user management and security administration of partner users be delegated to partner organizations to manage with minimal intervention from the organization. Administering partner security is seamless, and easy to implement. An enterprise administrator can set up the partner system and delegate administration responsibility to partner administrators. The partner administrator should then be able to create subsequent partner users and manage security for those users in a distributed manner.

This diagram illustrates the building blocks of Partner Relationship Management security, including enterprise-managed application security and partner-managed distributed security:



Security Building Blocks

Understanding Transaction (PeopleTools) Security in PRM

This section provides an overview of transaction security in PRM, and identifies:

- Partner roles and permissions.
- Sample user IDs for PRM.
- PRM dataset security in PeopleSoft Partner Commerce, Partner Sales, and Marketing.

Overview of Transaction Security

Transaction Security (PeopleTools Security) includes PeopleTools Security, Portal Registry, and Dataset Security. This can be implemented with existing PeopleTools functionality.

- *PeopleTools Security:* Set up permission lists, roles, and sample users.
- *Portal Registry:* Define folders and content references; set up security for the folders and content references.
- *Dataset Security:* Define data distribution rules, assign data distribution rules to PeopleTools roles, and attach the dataset to a Configurable Search definition.

Partner Roles and Permissions

This table provides guidelines for defining the roles and permissions to achieve PRM role-based navigation access to PeopleSoft transactions. Although these roles are delivered, you can add or modify, new or existing roles and permissions to fit your business requirements.

Role	***Permissions***
Enterprise Channel Manager	Responsible for managing the day-to-day transactional sales relationship between the enterprise and the Channel Partner: • Review new leads and determine distribution if manual. • Review status of leads already distributed. • Review pipeline. • Approve quotes generated by partner. • Manage one or more partners. • Manage partner registration and partner profiles. • Manage territory trees. • Manage application security.
Partner Administrator	Responsible for performing any administrative tasks that the enterprise has enabled for the partner: • Search and select customers. • Create new partner employees and establish security parameters. • Create organization groups (territories). • Clear and approve orders that are in "Hold" status. • View product catalog.
Partner Sales Manager	Responsible for a team of sales representatives: • Search and select customers. • Create and approve quotes and orders. • Search quotes and orders. • Access product catalog.

Role	Permissions
Partner Marketing Analyst	Responsible for marketing programs: • Add partner related tasks. • Adds partner related costs. • Views overall campaign status and progress.
Partner Marketing Manager	Responsible for marketing programs and views overall campaign status and progress.

Sample User IDs for PRM

This table lists the predefined user IDs, passwords, and associated roles for users implementing PeopleSoft Partner Relationship Management:

User ID	Password	Roles
ECM	ECM	Enterprise Channel Manager
PADMIN	PADMIN	Partner Administration
PMGR	PMGR	Partner Sales Manager
PREP	PREP	Partner Representative
PMKTA	PMKTA	Partner Marketing Analyst
PMKTM	PMKTM	Partner Marketing Manager

PRM Dataset Security

We deliver dataset security that will be used for the PRM solution. Please reference the table below for the dataset security that is enabled and which PRM product enables that security.

Partner Commerce Dataset Rules

Dataset Rule	Partner Administration	Partner Sales Manager	Partner Representative	Partner Marketing Analyst	Partner Marketing Manager
Orders as Partner Contact	No	Yes	Yes	No	No
Orders as Partner Manager	No	Yes	No	No	No

Partner Sales Dataset Rules

Dataset Rule	Partner Administration	Partner Sales Manager	Partner Representative	Partner Marketing Analyst	Partner Marketing Manager
Leads as Partner Owner	Yes	Yes	Yes	No	No
Leads as Partner Manager	Yes	Yes	No	No	No
Leads as Partner Team Member	No	Yes	Yes	No	No
All Organization Groups	No	No	No	No	No
Organization Groups as Owner	Yes	No	No	No	No
Organization Groups as Manager	Yes	No	No	No	No

Partner Marketing Dataset Rules

Dataset Rule	Partner Administration	Partner Sales Manager	Partner Representative	Partner Marketing Analyst	Partner Marketing Manager
All Audiences as Owner	No	No	No	Yes	Yes
All Audiences as Team Member	No	No	No	Yes	Yes
Published Audiences	No	No	No	Yes	Yes
Programs as Team Member	No	No	No	Yes	Yes

Partner for Financial Accounts Dataset Rules

Dataset Rule	Partner Administration	Partner Sales Manager	Partner Representative	Partner Marketing Analyst	Partner Marketing Manager
Accounts as Partner	Yes	No	Yes	No	No

Dataset Rule	*Partner Administration*	*Partner Sales Manager*	*Partner Representative*	*Partner Marketing Analyst*	*Partner Marketing Manager*
Accounts as Owner	Yes	No	Yes	No	No

Setting Up PeopleSoft CRM Application Security for PRM

This section provides an overview of CRM application security as applied to PRM, and discusses how to:

- Define partner security objects.
- Add partner membership and view lists.
- Define functional options and functional option groups.
- Add partner security profiles.
- Set up other security options.

Understanding PeopleSoft CRM Application Security for PRM

The application security framework (CRM Application Security) is a characteristic-based security framework that allows PeopleSoft customers to secure data and functions within a transaction. A group of partners—for example, European partners—are given access to a group of customers and this group of partners can add customers, generate quotes, submit orders, and so forth. Application security involves setting up and defining membership lists, view lists, and functional options. Together these three constructs constitute a PRM security profile.

- Membership List

  Define the characteristics of one or a group of users—for example, partner users—to whom system and data access and functional options are being granted.

  Users in a security membership list definition are recipients of a security profile. Membership lists can be either dynamic or static.

  A dynamic membership list is a set of characteristics that result in a constantly updated list of members for a membership list object. Even if the domain type is dynamic, you can still edit the membership criteria using the appropriate configurable search definition.

  A static membership list contains a specific list of members that you may associate with any security profile available in the system. So if you wish to specify the partners who will be part of a membership list you would use a static list, but if you want the list to continually update its list of partners, old and new, depending on defined criteria, you would use a dynamic selection.

- View List

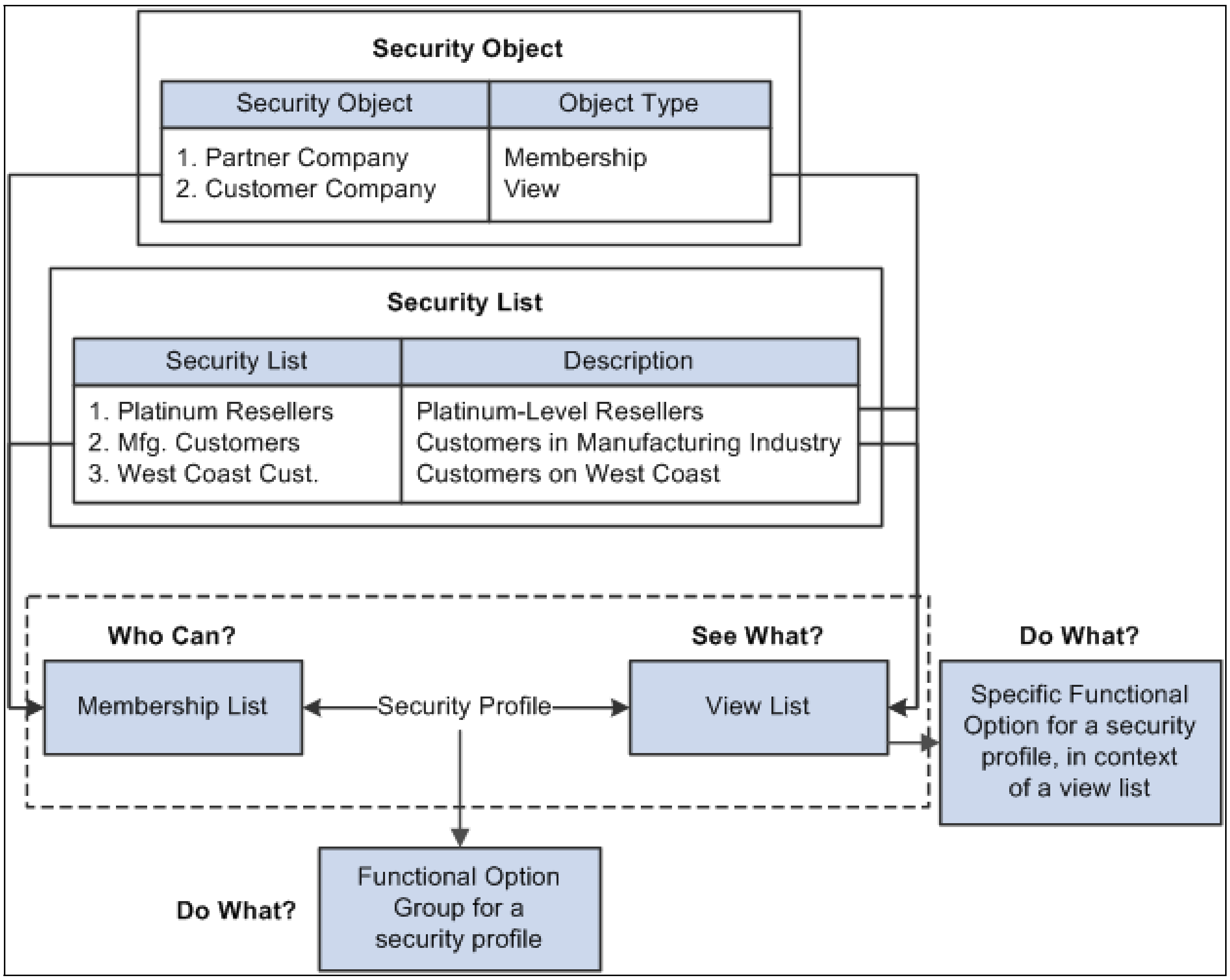
  Define characteristics of the viewing object—for example, partner customers, accounts—that are being secured from the Membership List.

- Functional Options

  Determine what a user can do within an application. For example, you can create functional options that enable users to submit orders or add new customers.

  To group view lists and functional options, you define a security profile. The security profile is then granted or associated to one or multiple membership lists. A functional option group is a grouping of functional options, which you can associate with a security profile.

The following example illustrates how security can be set up for partners, showing the relationship between security objects, security lists, and which list members are permitted to do and see what:



Application Security Data Model

1. Create a dynamic membership list that contains *All Platinum Reseller* type partners in the state of California.

   Run the list builder process to insert the list results into a list table.

2. Create a dynamic list of *All Consumers* in the state of California.

   Run the list builder process to insert the list results into a list table.

3. Create a security profile that has the membership list from step 1 and view list from step 2.

4. Log in and enter an order as:

   - A partner using the Platinum Reseller group.
   - An agent, entering an order on behalf of a partner using the Platinum Reseller group.

   Note. In both cases, the view list (all consumers in state of California) will be restricted based on the fact that the order contains the partner who is a member of the Platinum Reseller membership list.

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Setting Up Security and User Preferences"

Pages Used to Set Up PRM Application Security

Page Name	***Definition Name***	***Navigation***	***Usage***
Security Object	RSEC_OBJECT_DEFN	Set Up CRM, Security, CRM Application Security, Security Object, Security Object	View or edit the Partner security object.
Add Membership List	RSEC_MEMBER_SMRY	Set Up CRM, Security, CRM Application Security, Add Membership List, Add Membership List	Add a partner membership list. You can activate or deactivate the membership list. The membership list you create here will be associated to a security profile.
Add Membership List	RSEC_SRTY_WIZ1	Click the Nextbutton on the first Add Membership List page.	Select the partner membership object and the partner members to which you want the security object to apply.
Add Membership List	RSEC_SRTY_WIZ2	Click the Nextbutton on the second Add Membership List page.	Select a partner Membership Type of either *dynamic* or *static.*
Add Membership List (Dynamic)	RSEC_PARTNER_SRCH	Select the *Dynamic* radio button and click the Next button on the third Add Membership List page.	Choose the dynamic criteria that you want to use to select partners.
Add Membership List (Static)	RSEC_ML_PARTNER	Select the *Static* radio button and click the Next button on the third Add Membership List page.	Select the specific partners you want to add to the membership list.

Page Name	***Definition Name***	***Navigation***	***Usage***
Add View List	RSEC_VIEW_SMRY	Set Up CRM, Security, CRM Application Security, Add View List, Add View List	Enter the view list name and description. You can activate or deactivate the view list here.
Add View List	RSEC_SRTY_WIZ1	Click the Next button on the first Add View List page.	Select the Security Object type and the members to which you want the security object to apply.
Add View List	RSEC_SRTY_WIZ2	Click theNext button on the second Add View List page.	Select either a *Dynamic* or *Static* view type.
Add View List (Dynamic)	RSEC_CUSTOMER_SRCH	Select the *Dynamic* radio button and click Next at the bottom of the third Add View List page.	Choose the dynamic criteria that you want to use to select customers, or view list objects.
Add View List (Static)	RSEC_VL_CUSTOMER	Select the *Static* radio button and click Next at the bottom of the third Add View List page.	Choose the specific customers (or other view list objects) that you want to use.
Functional Option	RSEC_FUNC_DEFN	Set Up CRM, Security, CRM Application Security, Functional Option, Functional Option	Define functional options, including enabling amount-related fields, conditional operators, application classes, and messages.
Functional Option Group	RSEC_FUNC_GROUP	Set Up CRM, Security, CRM Application Security, Functional Option Group, Functional Option Group	Group functional options.
Security Profile	RSEC_PROFILE	Set Up CRM, Security, CRM Application Security, Add Security Profile, Security Profile	Define a partner security profile.
Security Profile - Membership	RSEC_PROFILEMEMBER	Set Up CRM, Security, CRM Application Security, Add Security Profile, Membership	Add partner membership lists to the partner security profile
Refresh Dynamic Lists	RSEC_BUILDER_RUN	• Set Up CRM, Security, CRM Application Security, Refresh Dynamic Lists, Refresh Dynamic Lists • Click Run from the Security Profile page.	Set run controls for the List Build process.

Page Name	Definition Name	Navigation	Usage
Static Menu Transfer	RSEC_STAT_MENU	Set Up CRM, Security, CRM Application Security, Static Menu Transfer Path, Static Menu Transfer	Enter static menu transfer paths.

Defining Partner Security Objects

Access the Security Object page (Set Up CRM, Security, CRM Application Security, Security Object, Security Object).

PeopleSoft PRM is delivered with several security objects. For example, *Partner* is a member security object and *Customer* is a view security object.

Note. Any new security objects created or any changes to the out of the box delivered security object definitions may require some configuration to get the intended functionality working.

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Setting Up Security and User Preferences," Defining Application Security

Adding Partner Membership and View Lists

Access the Add Membership List page (Set Up CRM, Security, CRM Application Security, Add Membership List, Add Membership List).

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Setting Up Security and User Preferences," Adding Membership List Names and Descriptions

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Setting Up Security and User Preferences," Adding View List Names and Descriptions

Defining Functional Options and Functional Option Groups

To define functional options and functional option groups, access the Functional Option (Set Up CRM, Security, CRM Application Security, Functional Option, Functional Option) and Functional Option Group (Set Up CRM, Security, CRM Application Security, Functional Option Group, Functional Option Group) pages.

The functional options that can be used with PRM are:

Functional Option Code	***Description***	***Application/Function***
CORE_RSF_FCAST_ROLLUP	Forecast will begin in rollup; otherwise it begins in summary.	Sales
CORE_RSF_FCAST_SIMPLE	Forecast simple reduces options presented to the forecast user.	Sales
CORE_RSF_ADVANCED	Controls basic versus advanced mode for lead and opportunity components.	Sales
CORE_RSF_AUTO_ASSIGN_OFF	Controls the ability to automatically assign a lead or opportunity at save in add mode.	Sales
CORE_RSF_DEFAULT_OWNER	When lead or opportunity is in add mode at save time, the current user is assigned as the primary sales representative by default. If revoked, then leave lead or opportunity unassigned.	Sales
CORE_RSF_SEARCH_PRODUCT_GROUP	Allows the end user to search for product group on leads and opportunities.	Sales
CORE_RSF_SHOW_SITE	Controls the ability to add a site to a lead or opportunity.	Sales
CORE_RSF_SUMMARY	Control the display of the summary page in lead and opportunity.	Sales
RO_MAX_DISCOUNT_PERCENT	Maximum discount percent.	Order Capture
RO_MAX_ORDER_TOTAL	Maximum order total reached.	Order Capture
RO_MAX_SURCHARGE_PERCENT	Maximum surcharge percent.	Order Capture
RO_MIN_MARGIN_PERCENT	Maximum profit margin percent.	Order Capture
SEARCH_ALL_PRODUCTS	When searching for products in Order Capture, this functional option give the user the ability to search for any products that are defined in the system instead of limiting them to the products that are defined in a catalog.	Order Capture
MKTHIDE	Hides marketing fields.	Marketing
MKTDISP	Makes marketing fields display-only.	Marketing

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Setting Up Security and User Preferences," Defining Functional Options

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Setting Up Security and User Preferences," Defining Functional Option Groups

Adding Partner Security Profiles

To define partner security profiles, access the Security Profile page (Set Up CRM, Security, CRM Application Security, Add Security Profile, Security Profile) and the Security Profile - Membership (Set Up CRM, Security, CRM Application Security, Add Security Profile, Membership) page.

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Setting Up Security and User Preferences," Adding Functional Option Groups and View Lists to the Security Profile

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Setting Up Security and User Preferences," Adding Membership Lists to the Security Profile

Setting Up Other Security Options

You can set up run controls for the List Build process. This allows you to refresh the dynamic membership lists and view lists, all security objects, and profiles that you have created to implement security for PRM. If the content of the lists, objects, and profiles changes frequently, you can set up this process to run daily, every few minutes, or every few hours.

You can also create static menu transfer paths for entering or viewing static list data that is either dynamically created or entered manually. Irrespective of how a membership or view list is created, the results of the list or the list members are stored in a list table. In order to see the list members, a page and a component are created and attached to a menu. The static menu transfer path shows the location of the transfer component.

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Setting Up Security and User Preferences," Setting Run Controls for the List Build Process

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Setting Up Security and User Preferences," Entering Static Menu Transfer Paths

Chapter 7

Setting Up and Managing Partner Registration

This chapter provides an overview of partner registration and discusses how to:

- Set up partner registration.
- Register a partner.

Understanding Partner Registration

In order to allow potential partners to apply for partnership online, your enterprise can provide a self-service registration process. The prospective partners can then access a public web site for your enterprise and enter their company information, answer questions, and submit an application.

The partner registration feature allows potential partners to apply for partnership online and receive email notification after submitting the application. The enterprise administrator can configure the partner registration process, partner profile attributes, and email notifications. The Enterprise Channel Manager can receive email notification of new applications, review registration history, and send email to the prospective Partner Relationship Manager automatically.

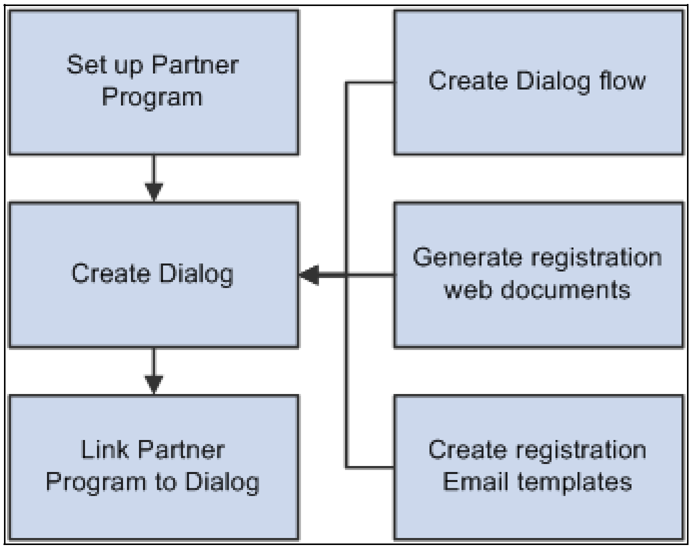
Using partner registration you can:

- Enable partner companies' applications for partnership and registration via an online self-service registration process.
- Maintain a history of partner status, including application and registration outcomes.
- Configure the partner registration process to define your own partner registration process flow, profile attributes to track, registration documents, and Email templates.

PRM self-service registration is totally configurable, so you will use the PeopleSoft Online Marketing dialog feature to define your own partner registration process, including setting up registration confirmation/notification email documents. Dialogs will also be used for designing and rendering registration web pages at run time. PRM comes with a limited license to the dialog feature of PeopleSoft Online Marketing; an additional license of PeopleSoft Online Marketing is not required.

Partner Registration Setup Flow

The following diagram illustrates the registration setup flow, including partner program setup, dialog creation, and linking the partner program to the dialog:

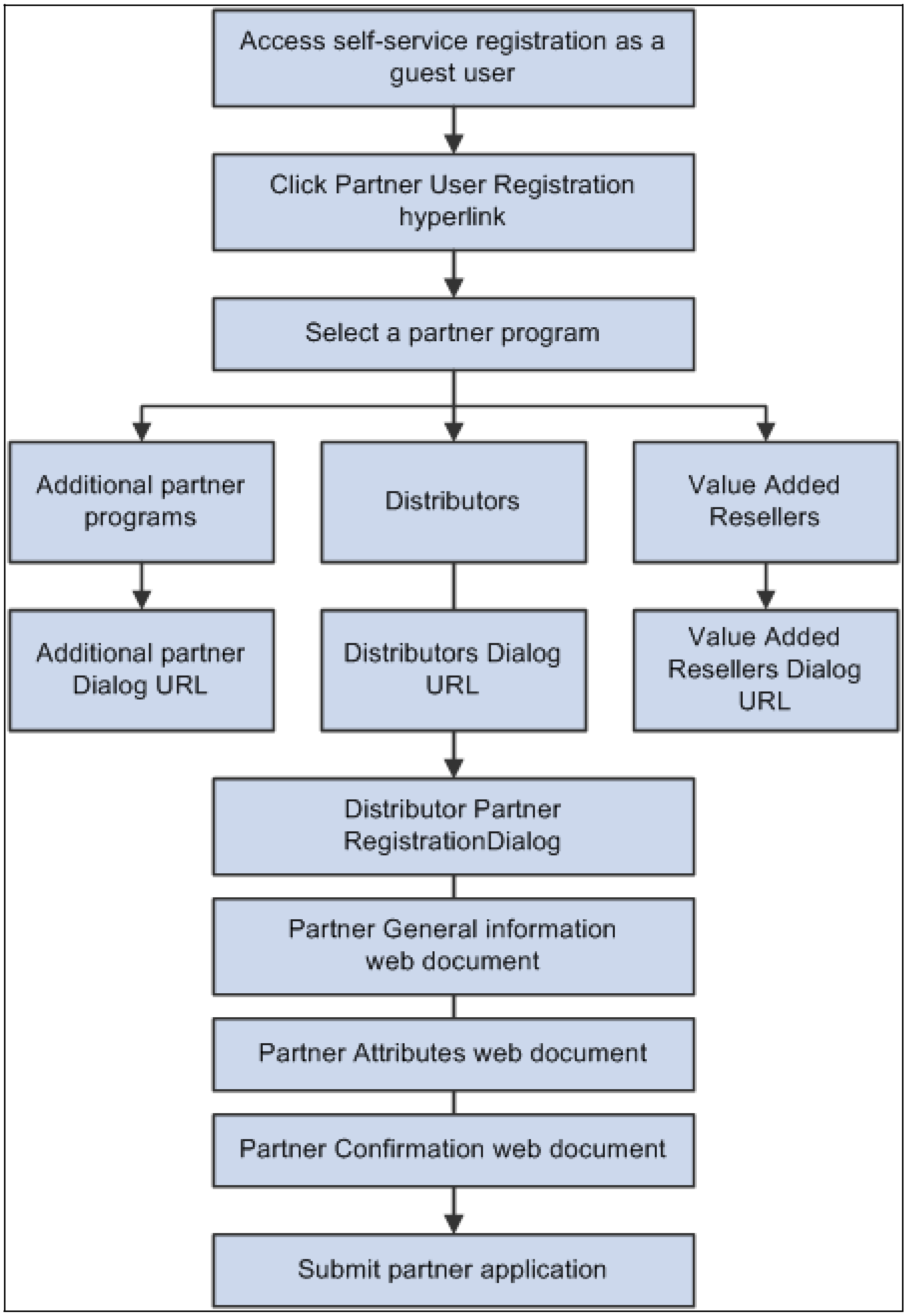


Registration Setup Flow

The setup includes setting up partner programs , defining customized profile attributes in Marketing Profile (optional), creating a dialog using the PeopleSoft Online Marketing dialog functionality, associating the dialog to the partner program, and creating a dialog flow, registration Web Documents and Email notification templates. You will need to follow through this flow and complete each task to create your self-service registration process.

Partner Registration Process Flow

The following diagram illustrates a typical partner registration process flow used during online registration. PeopleSoft delivers this sample dialog that you may wish to use and modify to suit your business requirements.



Partner registration process flow

Setting Up Partner Registration

To set up partner registration, use the Add Partner Program (RD_PR_PROG) component.

This section discusses how to:

- Set up partner programs.
- Create dialogs.

- Link partner programs to dialogs.

Pages Used to Set Up Partner Registration

Page Name	*Definition Name*	*Navigation*	*Usage*
Partner Program	RD_PR_PROG	Partners CRM, Add Partner Program, Partner Program	Set up a partner program.
Dialog Designer	RY_DIALOG	Marketing, Dialog Designer, Dialog Designer	Create a dialog flow.
Document	RY_EDOC	Marketing, Document Designer, Document	Generate registration web documents.
Document	RY_EDOC	Marketing, Document Designer, Document	Create registration confirmation and notification email templates.

Setting Up Partner Programs

Access the Partner Program page (Partners CRM, Add Partner Program, Partner Program).

See and Chapter 4, "Creating Partner Programs," Setting Up the Partner Program Environment, page 14.

Creating Dialogs

This section discusses how to:

- Create dialog flow.
- Generate registration web documents.
- Create registration confirmation and notification email templates.

See and Chapter 4, "Creating Partner Programs," Creating Dialogs for Partner Programs, page 20.

Creating Dialog Flow

Access the Dialog Designer page (Marketing, Dialog Designer, Dialog Designer).

Note. When creating a dialog for partner registration, set the value for New Individual Role to *Contact for Partner*.

See and *PeopleSoft Online Marketing 9.1 PeopleBook*, "Designing Online Dialogs," Creating a New Dialog.

Generating Registration Web Documents

Access the Dialog Designer page (Marketing, Dialog Designer, Dialog Designer).

See and *PeopleSoft Online Marketing 9.1 PeopleBook*, "Designing Web Documents."

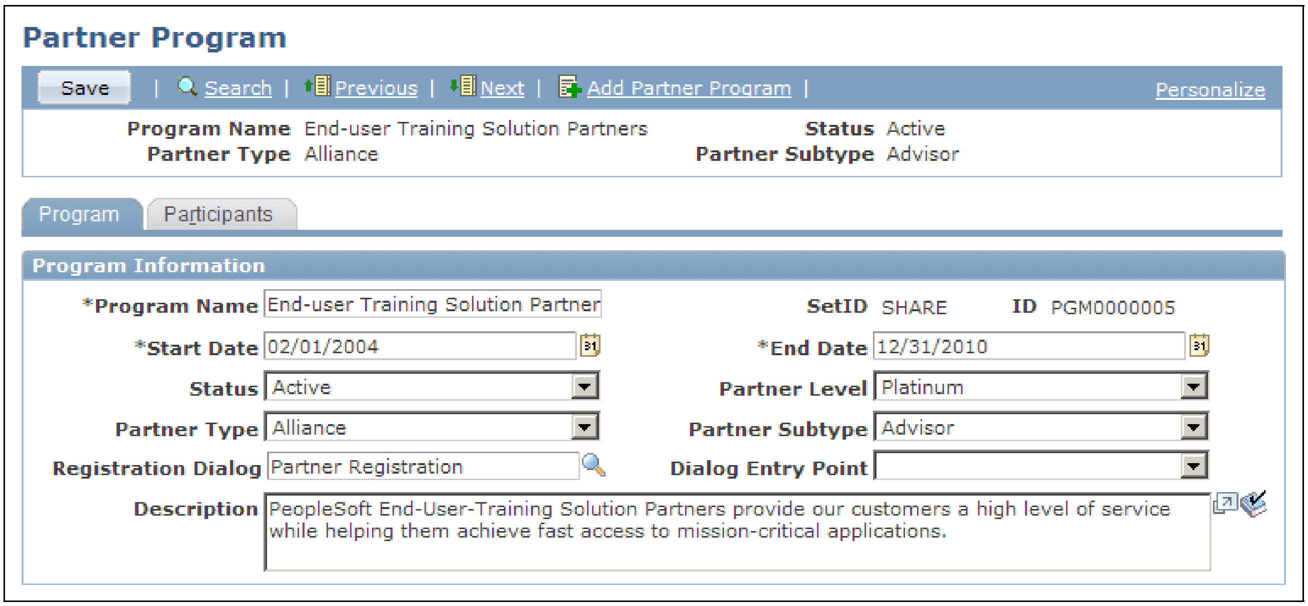
Creating Registration Confirmation and Notification Email Templates

Access the Dialog Designer page (Marketing, Dialog Designer, Dialog Designer).

See and *PeopleSoft Online Marketing 9.1 PeopleBook*, "Designing Email Documents."

Linking Partner Programs to Dialogs

Access the Partner Program page (Partners CRM, Add Partner Program, Partner Program).



Partner Program page

Registration Dialog Displays the dialog that has been defined through the dialog creation process in PeopleSoft Marketing.

Dialog Entry Point Displays the document or trigger point of the dialog that will launch the dialog for the end user.

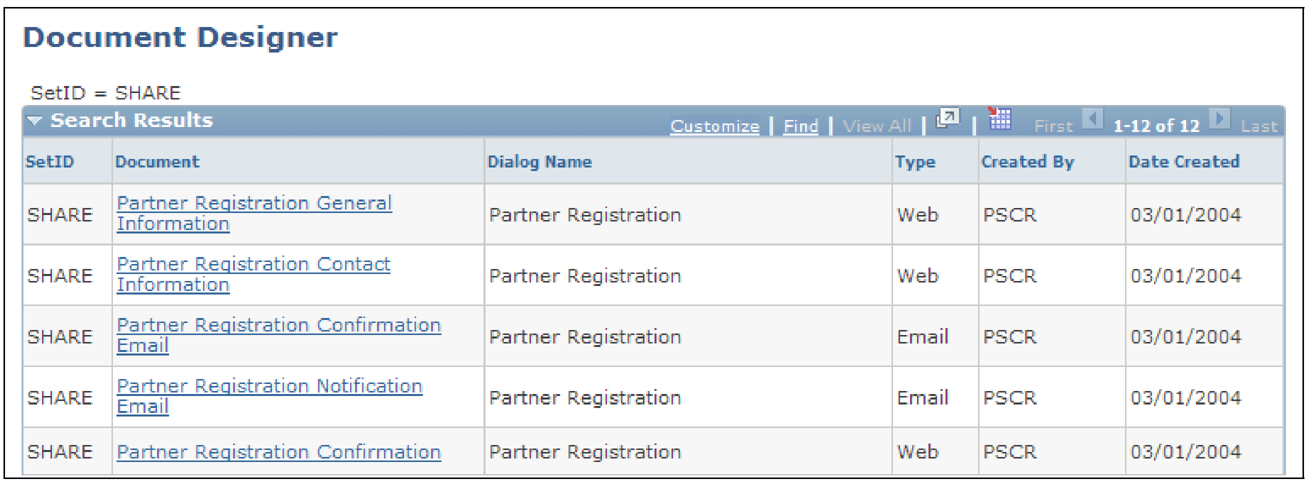
Registering a Partner

For partner registration, PeopleSoft delivers a sample dialog and sample documents. They are named *Partner Registration XXX* and can be found under Marketing, Dialog Designer or Marketing, Document Designer. Because of the data complexities surrounding the publishing of a dialog–Go Live–these are delivered in design mode and must be activated. You can start by cloning and modifying the provided sample data, or use this as a guide to create your own registration dialogs. These dialogs are provided as samples only.

It is recommended that you work through the following steps to activate and test the delivered data before setting up your enterprise partner registration.

Validating Sample Documents

Navigate to Marketing, Document Designer. Confirm the following documents exist:


Document Designer

SetID = SHARE

Search Results — Customize | Find | View All | First 1-12 of 12 Last

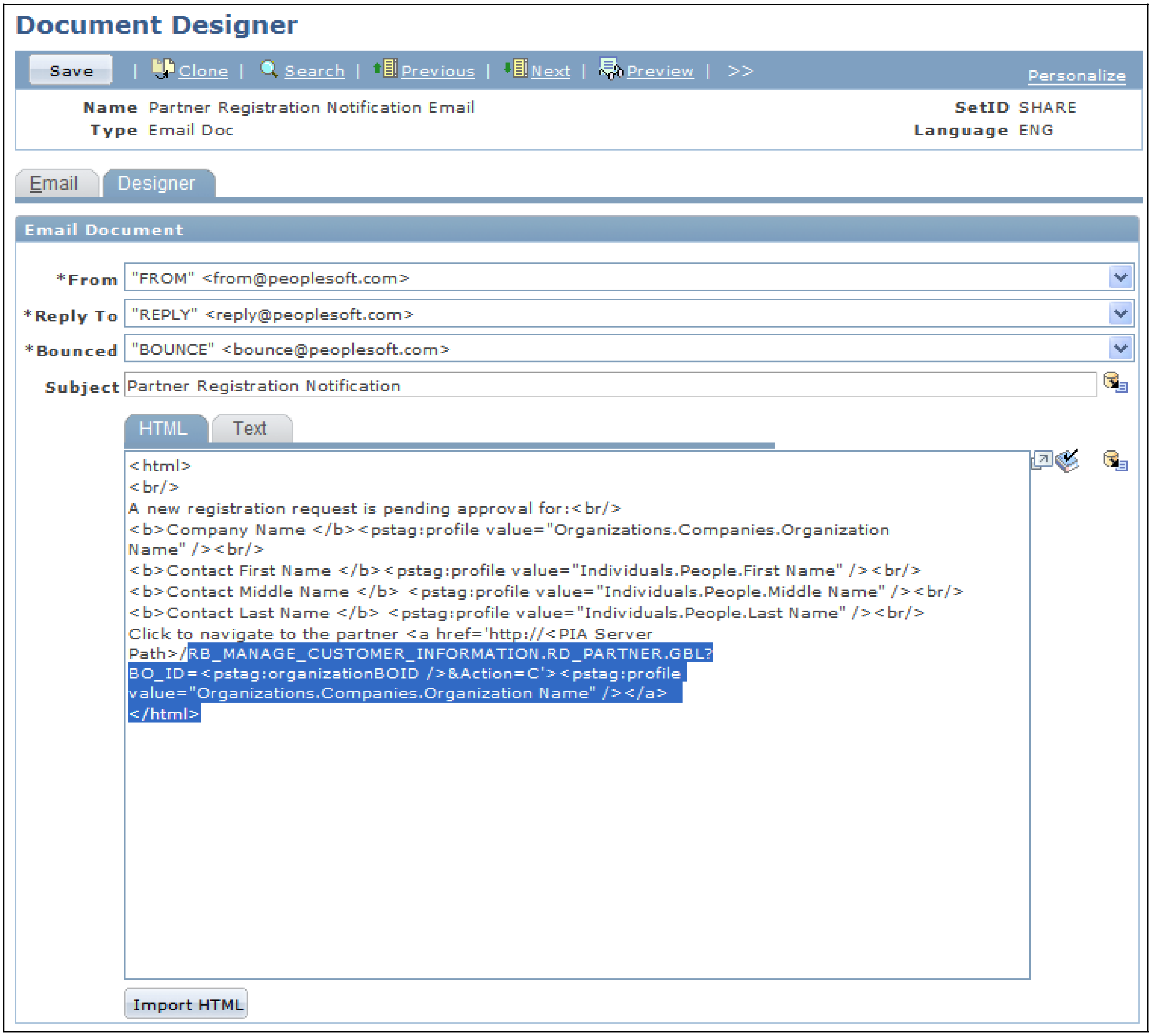
SetID	Document	Dialog Name	Type	Created By	Date Created
SHARE	Partner Registration General Information	Partner Registration	Web	PSCR	03/01/2004
SHARE	Partner Registration Contact Information	Partner Registration	Web	PSCR	03/01/2004
SHARE	Partner Registration Confirmation Email	Partner Registration	Email	PSCR	03/01/2004
SHARE	Partner Registration Notification Email	Partner Registration	Email	PSCR	03/01/2004
SHARE	Partner Registration Confirmation	Partner Registration	Web	PSCR	03/01/2004

Document Designer page

Updating the Notification URL

Click the *Partner Registration Notification Email* link.

Update the <pia server path> portion of the URL in the document text to point to the PIA server, as shown in the example below:



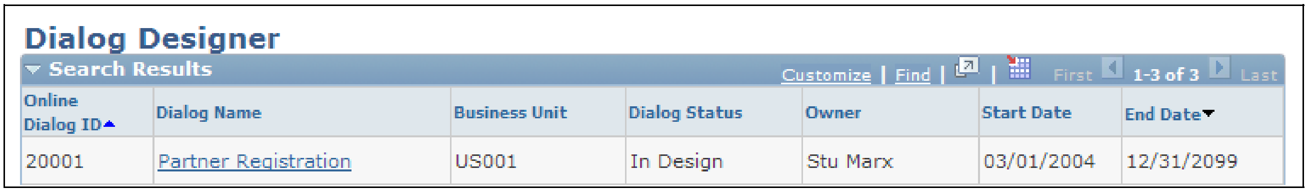
Document Designer page

In the email you will now see a link with the company name that you can click on to navigate directly to the partner company.

Click to navigate to the partner *test.*

Validating Sample Dialogs

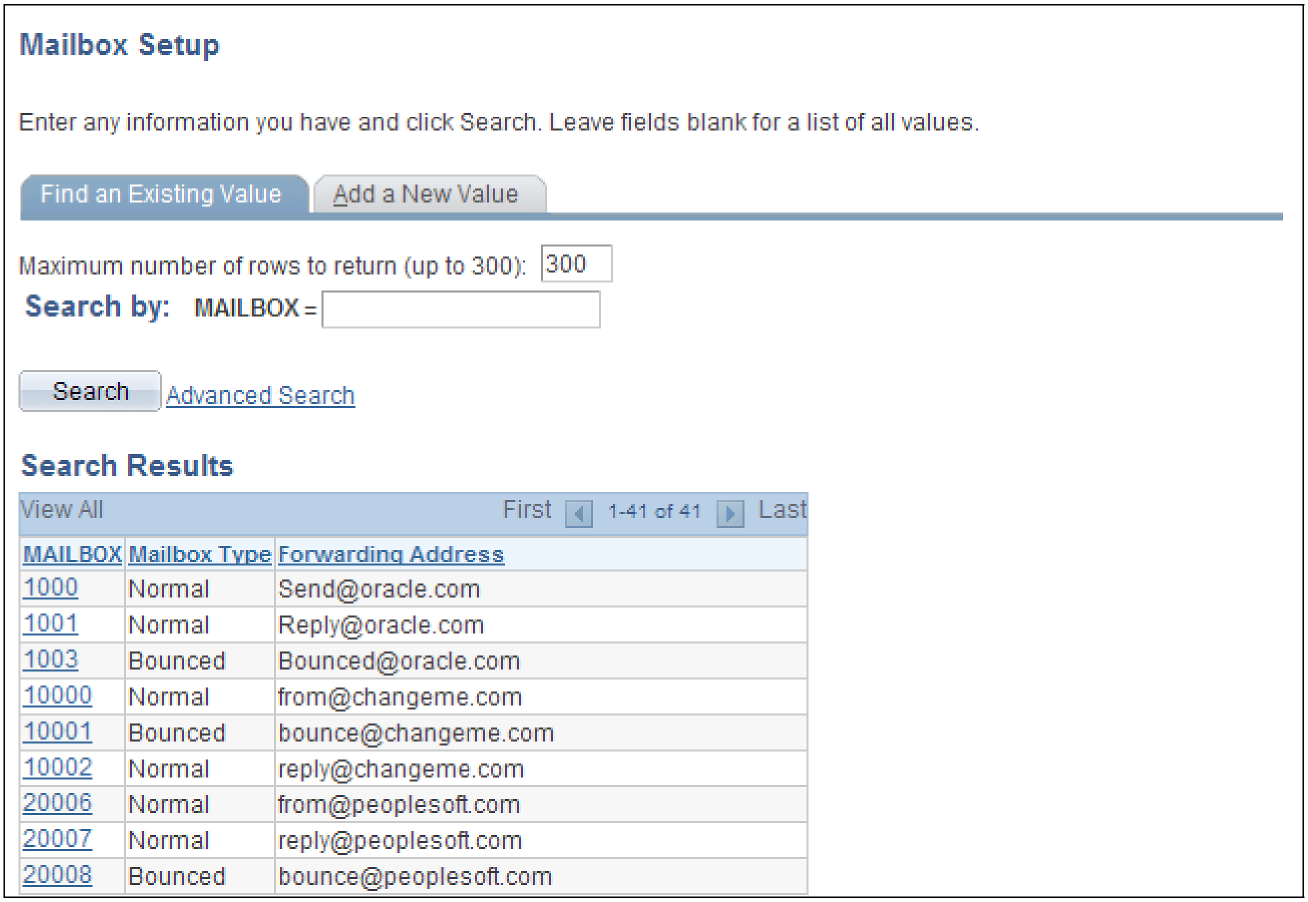
Navigate to Marketing, Dialog Designer. Confirm that the following dialog exists:



Dialog Designer page

Validating Email Mail Boxes

Navigate to Set Up CRM, Product Related, Online Marketing, MailBox Setup. Set up your own email boxes with valid email addresses.

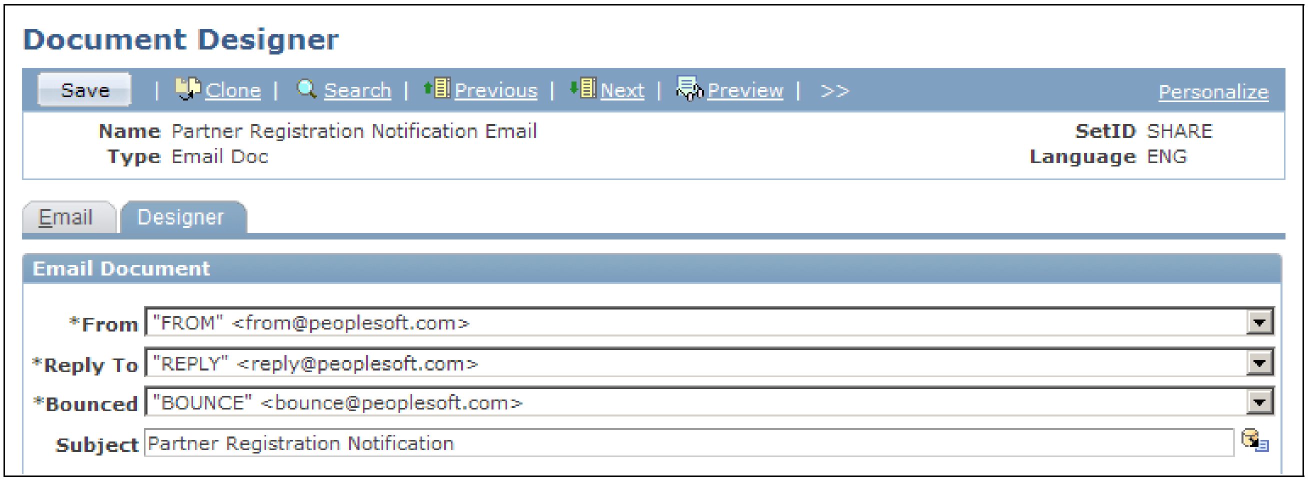


Mailbox Setup page

Validate these mailboxes appear on the two partner email documents, but with the updated email addresses you set up for the mailboxes.

Navigate to Marketing, Document Designer.

Open *Partner Registration Notification Email* and *Partner Registration Confirmation Email* to confirm.

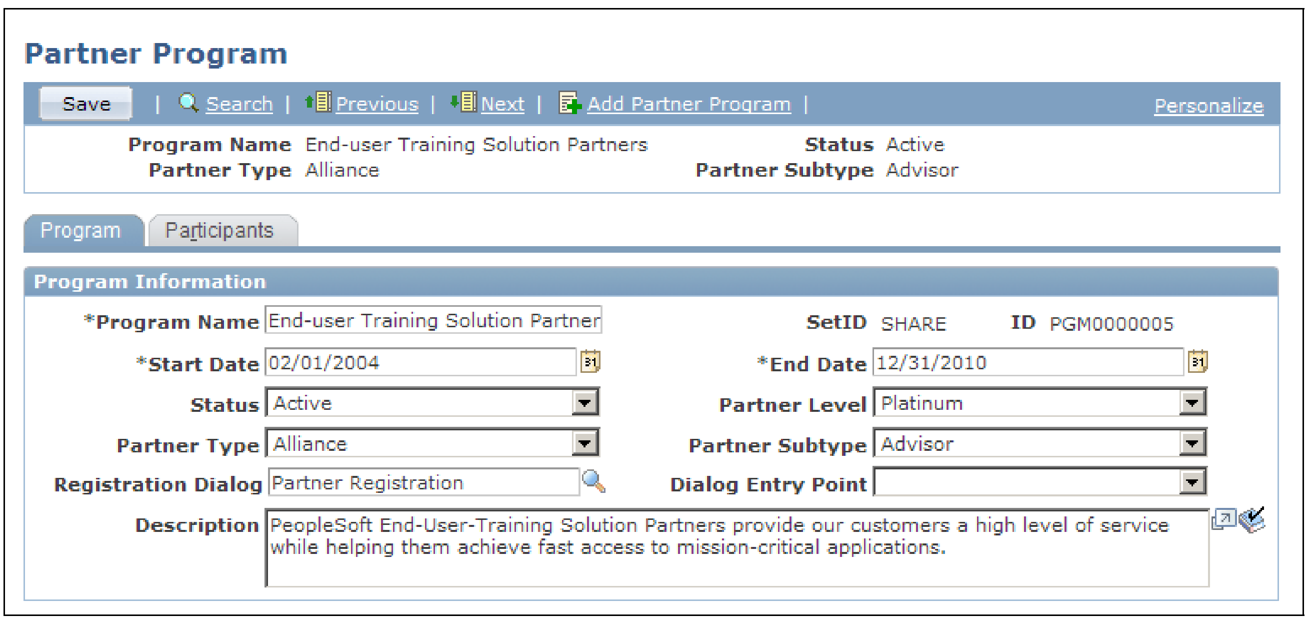


Document Designer page

Validating the Partner Program

Navigate to Partners CRM, Search Partner Program, Partner Program.

Verify that the Registration Dialog and Entry Point are specified for this dialog.



Partner Program page

Note. This is setID driven.

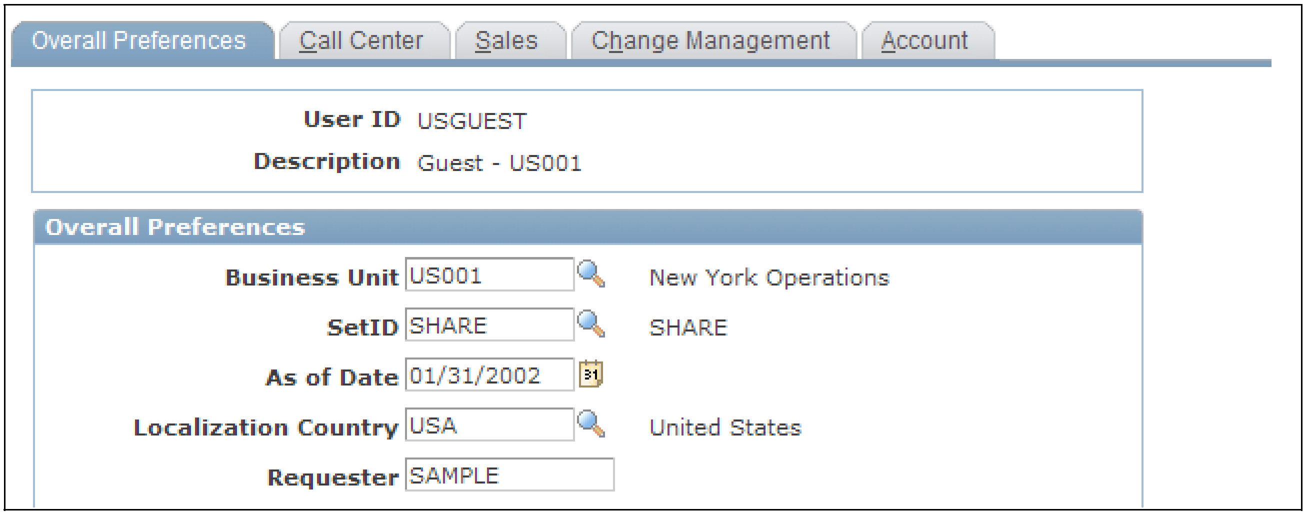
Setting Up User Preferences

The registration page filters partner programs by setID if it is specified in the user's preferences. Change the setID of the user you will test with to match the setID of the dialog.

Navigate to Set Up CRM, Security, User Preferences, Overall Preferences. These preferences are set up for the guest user that will be used for your enterprise's CUSTOMER portal site in order to bypass signon.

See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Setting Up Customer Self-Service."

See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Setting Up Security and User Preferences."



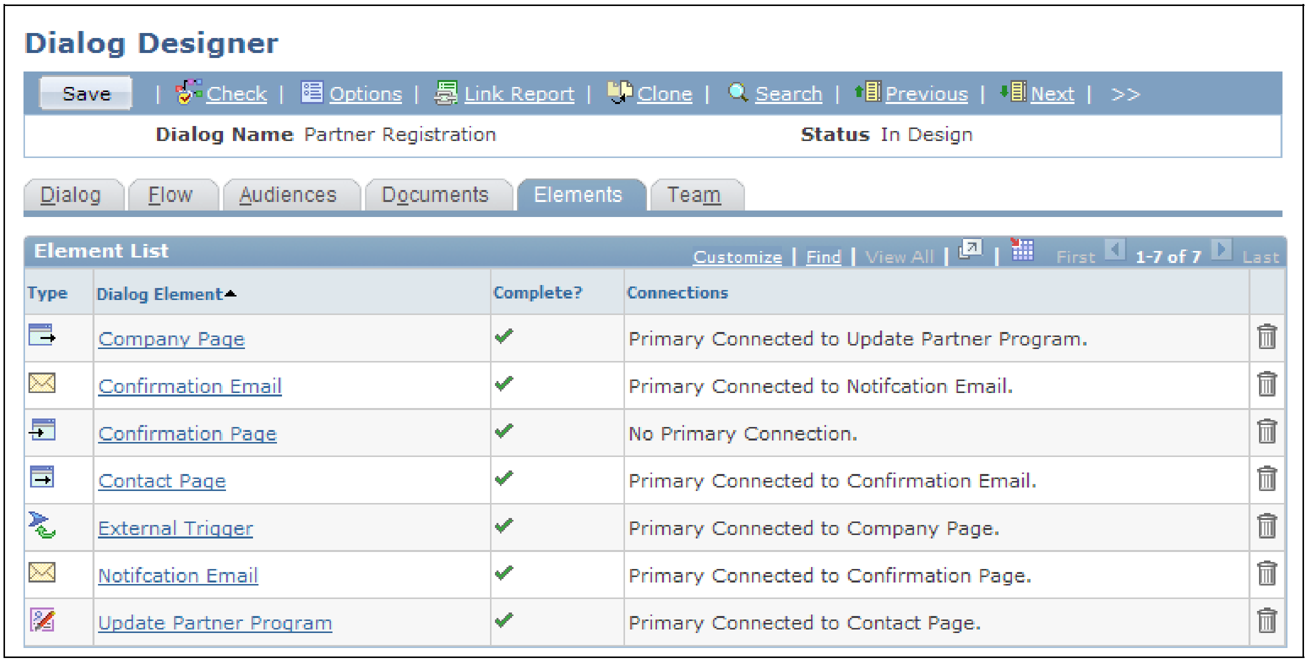
Overall Preferences page

Going Live with the Partner Registration Dialog

Navigate to Marketing, Dialog Designer.

Select *Partner Registration.*

Confirm that *Update Partner Program* points to the correct partner program.



Dialog Designer - Elements page

Click the Check button in the toolbar.

Click the Run All Checks button.

All should pass the consistency check.

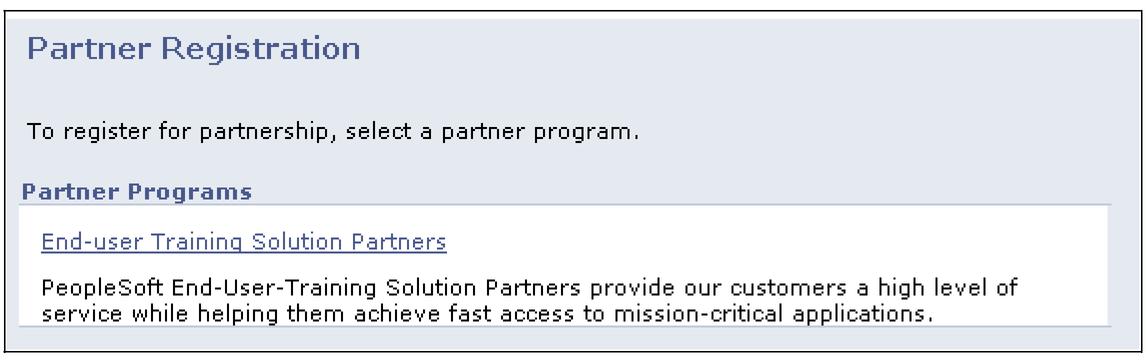
Return to Dialog Designer, Dialog page.

Click Go Live. Live status will be confirmed.

Launching Registration

Access the customer portal registry. The guest user established in the steps above will automatically be used for guest access to the customer registry.

Navigate to the Partner Registration to launch a partner registration dialog.



Partner Registration page

Select the partner program you have associated the dialog to. This will launch the dialog as you have configured it. Your partners will be able to fill in this information and register for partnership as you have configured it.

Submit and view the confirmation.

Validating Data

The captured partner registration data is then saved to the Online Marketing Profile tables (organization data is written to the BO_BASIC_ORG table and individual data is written to the BO_BASIC_IND table). The partner organization data is also saved to the partner profile tables in the business object relationship model or BORM tables.

See and Chapter 5, "Creating and Maintaining Partner Profiles," page 25.

Chapter 8

Setting Up Distributed Security for Partner Users

This chapter provides overviews of distributed security for partners and the distributed security process flow and discusses how to:

- Set up distributed security for partner users.
- Manage partner user groups in self-service.

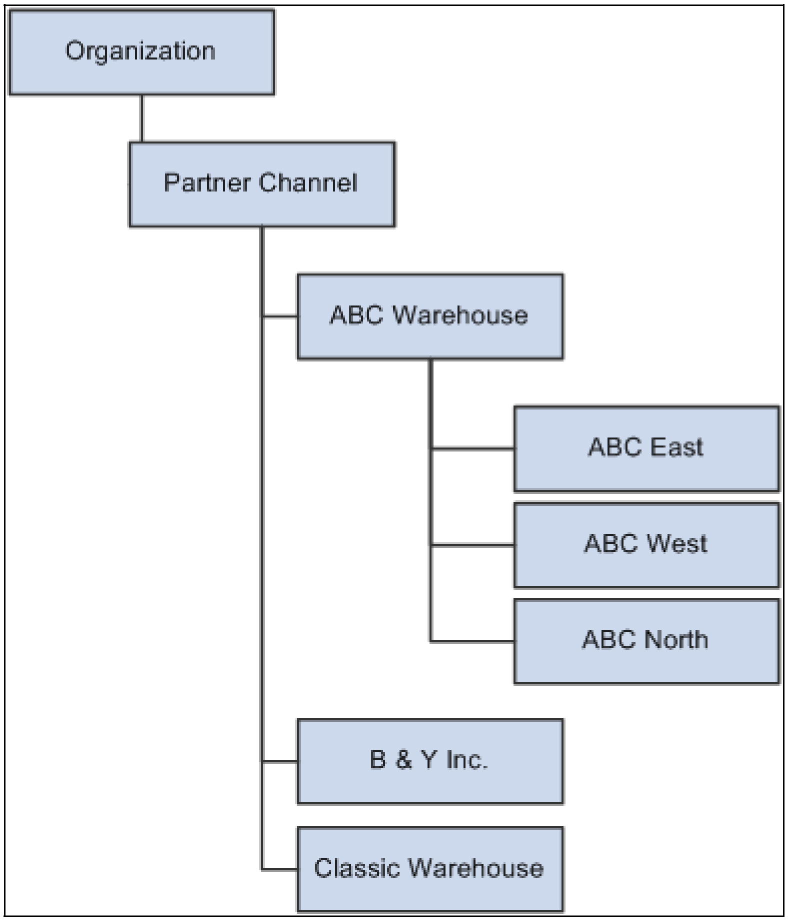
Understanding Distributed Security for Partners

Distributed security or delegated administration provides the ability to delegate administrative responsibility to multiple administrators and managers in an organization in a secured fashion. Distributed security for partners enables partner administrators to set up team members for the user groups they manage and also define subordinate user groups. Given the potentially large numbers of partners that an enterprise can do business with, it is critical for a partner to be able to manage application access and permissions for their own employees.

Centralized administration in a partner-intensive environment is extremely complex to manage and often doesn't scale in practice. By allowing partners to self-register, set up users, maintain their own profiles, and create and manage their own organizational groups, PeopleSoft's PRM solution addresses the need to simplify and decentralize partner management.

For distributed security and partner self-service requirements, the enterprise channel operations manager determines what roles and access privileges a partner administrator is allowed to assign when he creates additional accounts for partner employees. Ideally, a partner administrator should be able to customize the access privileges and further restrict what a partner user has access to, as long as any new access combination still remains within the confines of what the enterprise channel manager delegated in the first place.

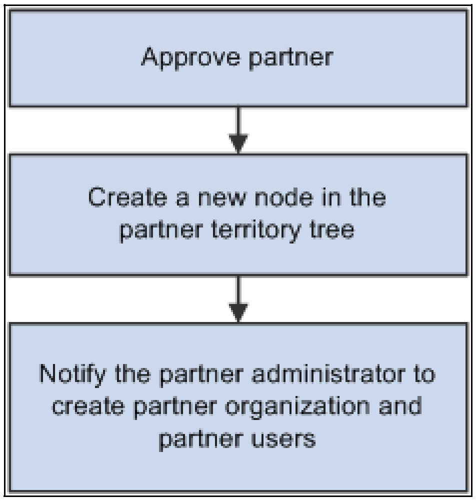
The following example shows delegated security where the Enterprise Administrator or Channel Manager sets up user groups in the organization hierarchy for each partner company; for example, ABC Warehouse, B&Y Inc, and Classic Warehouse:



Example of organization hierarchy

Understanding the Distributed Security Process Flow

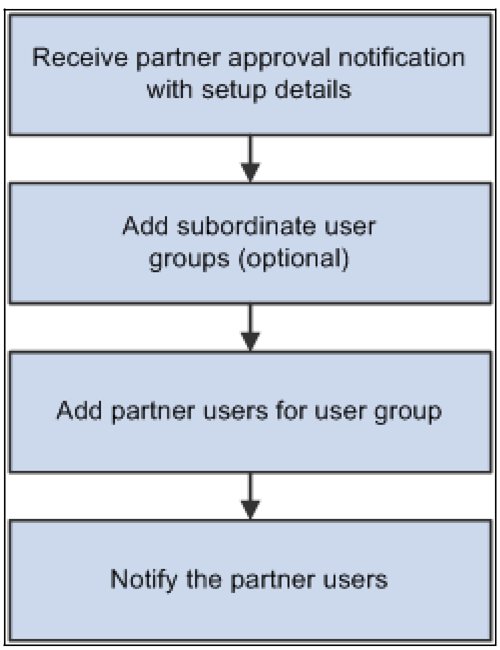
The following diagram illustrates a distributed security process flow. Your enterprise may define a different process flow to suit your unique business needs.



Distributed security process flow for the enterprise channel manager

As the first step in the distributed security process, the partner company applies and provides information about the company and a single point of contact, such as a partner administrator. The enterprise administrator sets up user groups in the organization hierarchy for each partner company. Once the enterprise completes the task of setting up partner user groups, an email notification is sent to the partner administrator. The enterprise grants the designated partner administrator access to the system.

This diagram illustrates a distributed security process flow for a partner administrator:



Distributed security process flow for the partner administrator

The partner administrator can now define teams and maintain the hierarchy for their organization. For example, the partner administrator for ABC Warehouse has the ability to set up multiple team members in the ABC Warehouse user group. This feature enables the partner administrator to add subordinate groups to the ABC Warehouse user group. The Territory tree is used to model the partner organization hierarchy.

The partner administrator can create partner employees in the system by defining User IDs and default passwords and automatically emailing this information to the respective users.

Distributed security also provides the partner administrator with maintenance functionality. The partner administrator can:

- Add subordinate user groups.
- Transfer partner users from one user group to another.
- Activate and deactivate partner users.
- Reset passwords.

See Also

Chapter 6, "Setting Up Security for Partners," page 53

Setting Up Distributed Security for Partner Users

This section discusses how to:

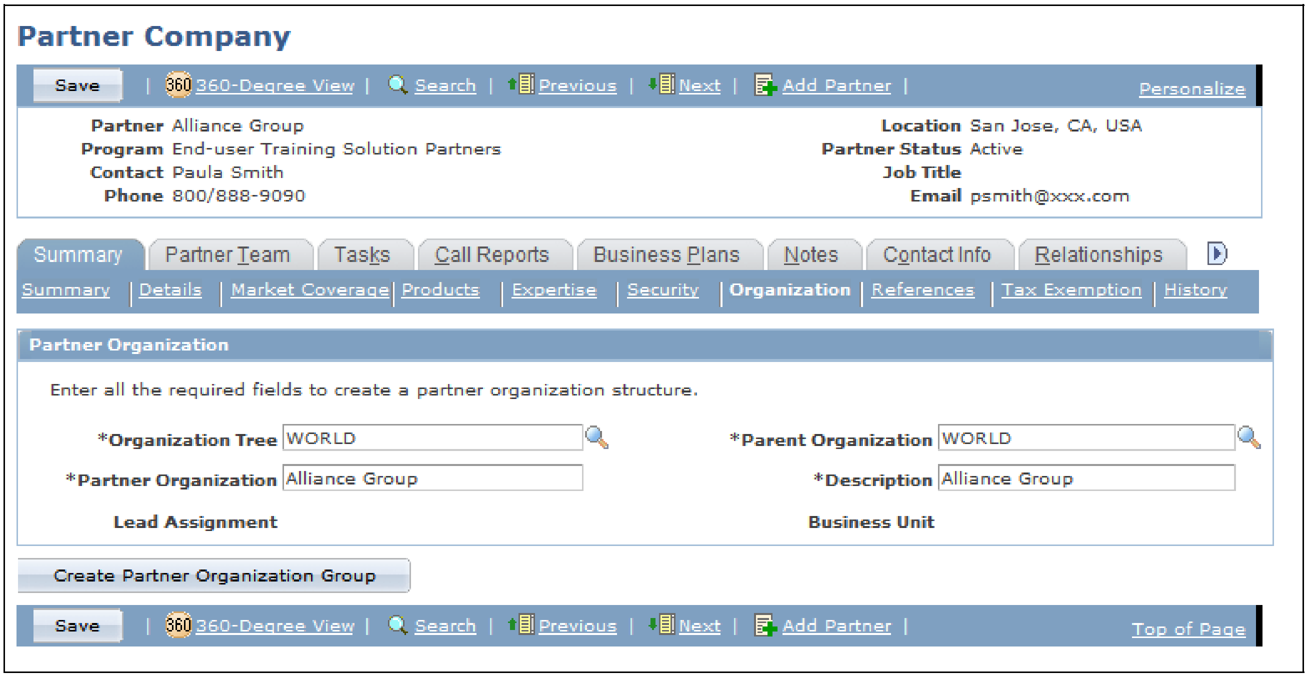
- Create a partner organization structure.
- Add partner users.
- Add partner user groups and child territories to the territory tree.

Pages Used to Set Up Distributed Security for Partner Users

Page Name	Definition Name	Navigation	Usage
Partner Company	RD_PTNR_ORG	Partners CRM, Search Partner Company, Partner Company, Summary, Organization	Create a partner organization structure.
Manage Partner Users	RD_PTNR_USER_SRCH	Partners CRM, Manage Partner Users, Manage Partner Users	Add partner users.
Tree Manager	PSTREEMGR	Sales, Manage Territories	Add partner user groups to the territory tree.

Creating a Partner Organization Structure

Access the Partner Company - Organization page (Partners CRM, Search Partner Company, Partner Company, Summary, Organization).



Partner Company - Organization page

Organization Tree

Select the organization tree that the partner organization will belong to.

Note. The tree prompt is restricted to those that the enterprise user can access.

Parent Organization

Select the parent organization for the tree. The prompt is restricted to those organizations or territories with Business Units that are related to the setID of the Partner company.

Partner Organization

Enter the name of the partner organization.

Description

Enter a short description of the partner organization.

Lead Assignment

The system displays the lead assignment. The lead assignment is provided by default from the Parent Organization lead assignment and copied to the Partner Organization.

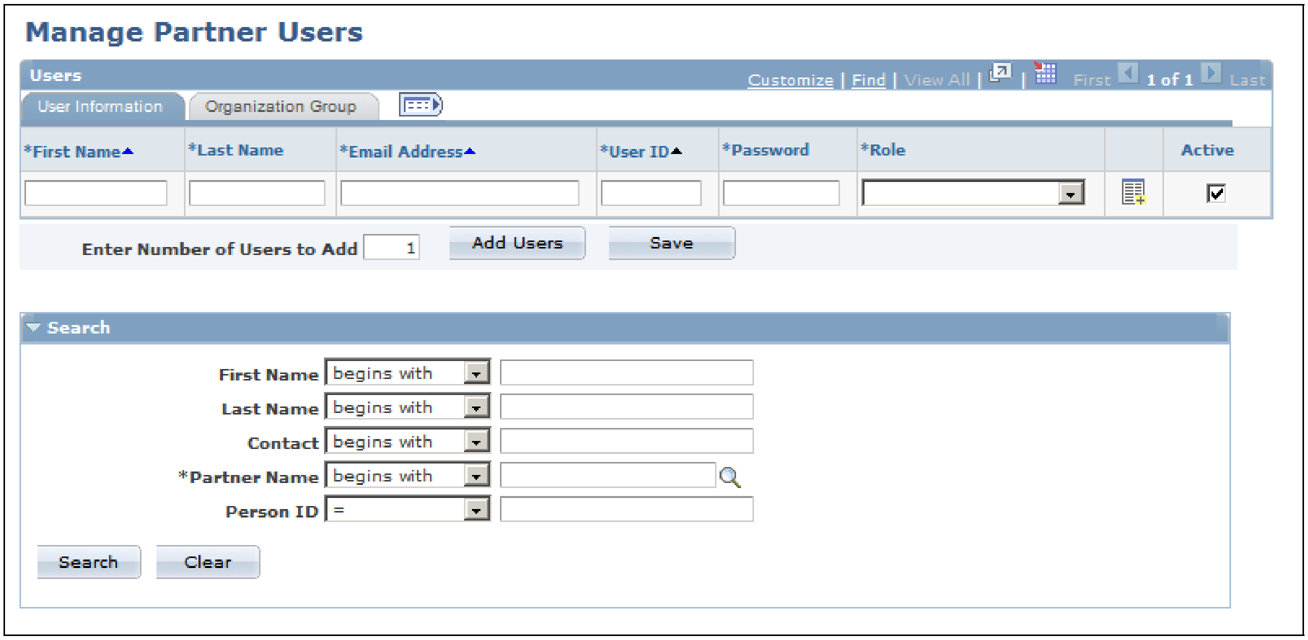
Business Unit

The system displays the business unit. The business unit is provided by default from the Parent Organization business unit and copied to the partner organization.

Create Partner Organization Group Click the Create Partner Organization Group button to create the partner group.

Adding Partner Users

Access the Manage Partner Users page (Partners CRM, Manage Partner Users, Manage Partner Users).



Manage Partner Users - User Information page

Use this page to add users to the user group. The user can also update password information through self-service. Select a role for each user.

See and Chapter 5, "Creating and Maintaining Partner Profiles," Creating and Managing Partner Users, page 48.

Adding Partner User Groups and Child Territories to the Territory Tree

Access the Search Territories page (Sales, Manage Territories).

The Sales Territory tree is used to model the partner organization. This organization hierarchy can be set up using the Tree Manager, or the enterprise administrator or channel manager can access the territory tree in Sales to add partner user groups and sub-organizations.

See and *PeopleSoft Sales 9.1 PeopleBook*, "Working with Territories and Assignment Groups."

Managing Partner User Groups in Self-Service

This section discusses how to:

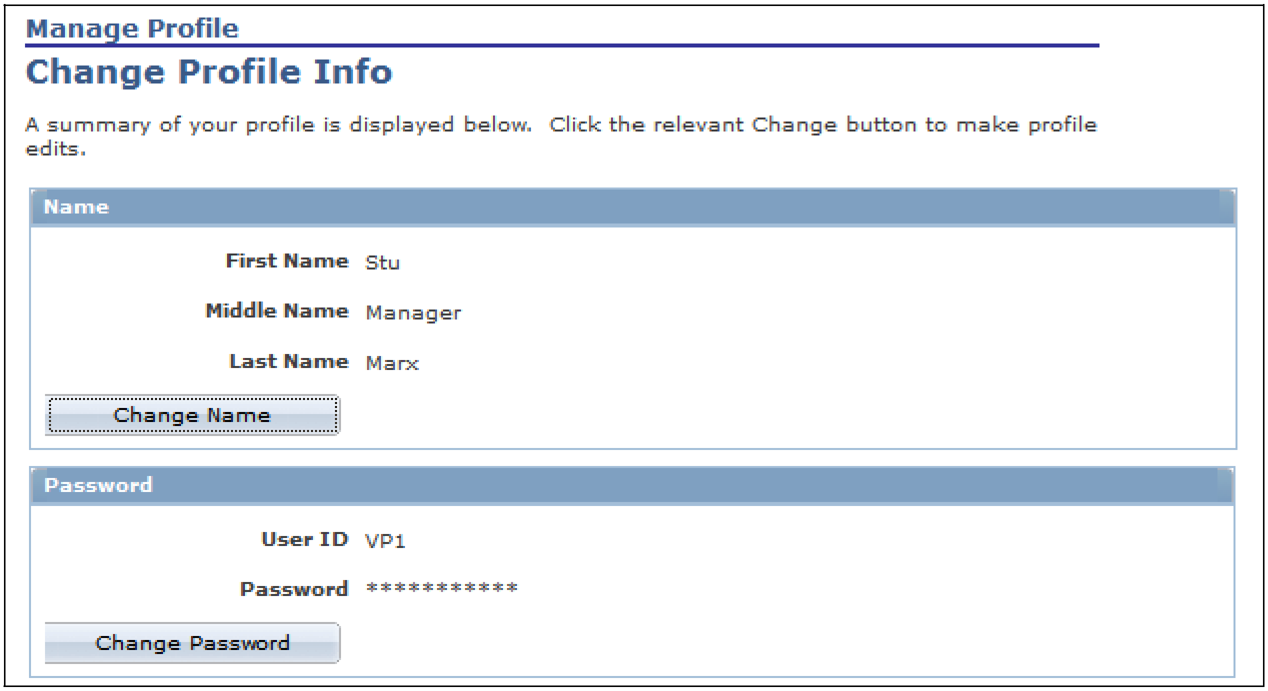
- Manage profiles.
- Manage partner user groups.
- Maintain partner organization groups.
- Search Territories .

Pages Used to Manage Partner User Groups in Self-Service

Page Name	*Definition Name*	*Navigation*	*Usage*
Manage Profile	RX_NAME_SIGNIN	Change Profile Info, Manage Profile	Change user name or password.
Register Users - User Information	RD_PTNR_USER_SRCH	Register Users, Register Users, User Information	Administer users in the partner user group. The Register Users page lists all of the partner users for the partner company associated with the partner administrator who is logged in. The partner company is derived from the User Preference information associated with the partner administrator.
Additional Roles	RD_PTNR_USER_ROLES	Click the Additional Roles icon.	View, add, or delete additional roles for the user.
Manage Partner Users	RD_PTNR_USER_SRCH	Register Users, Register Users, Organization Group	Add users to groups within the partner organization.
Search Territories	RSF_TR_PTNORG_SRCH	Register Users, Search Territories	Search for groups in which the user is the owner, the manager, or both.

Managing Profiles

Access the Manage Profile page (Change Profile Info, Manage Profile).

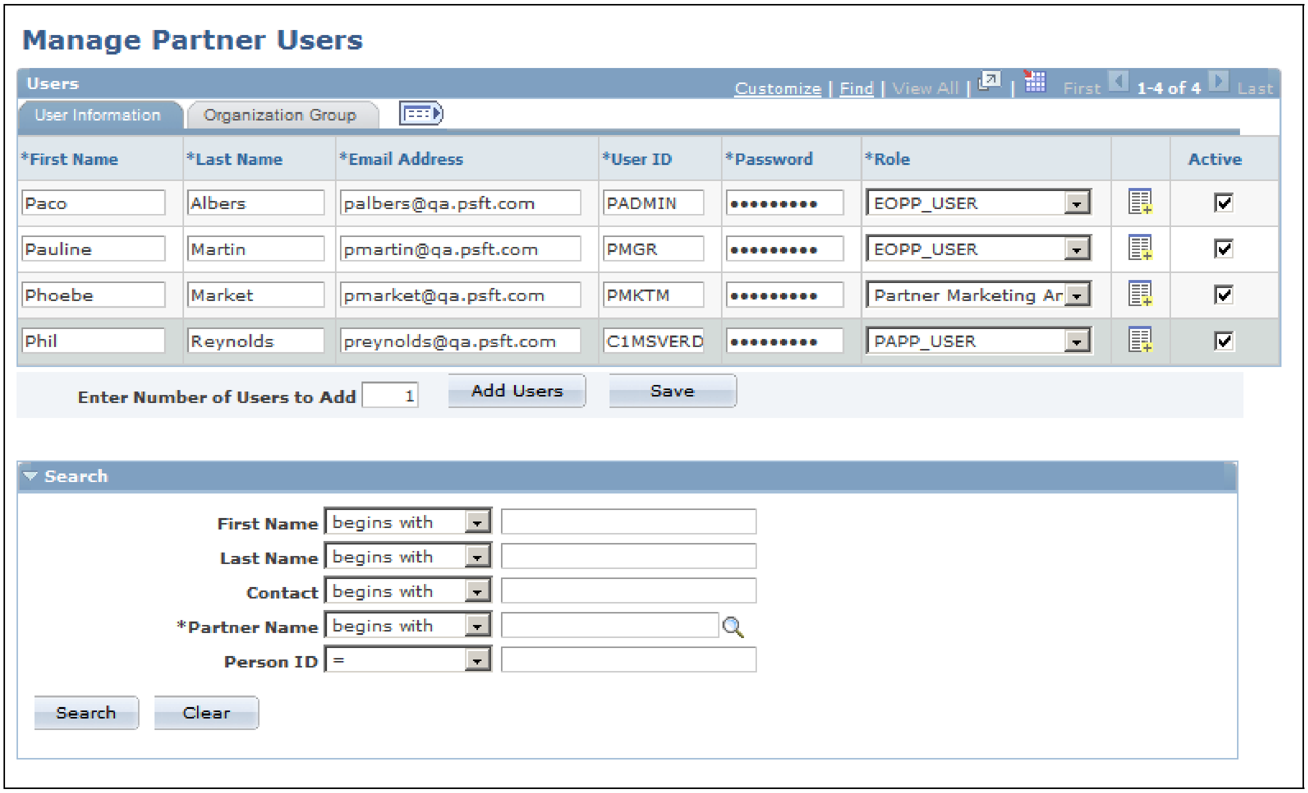


Manage Profile page

Users can change their names or passwords on this self-service page.

Managing Partner User Groups

Access the Manage Partner Users (Register Users, Register Users, User Information).

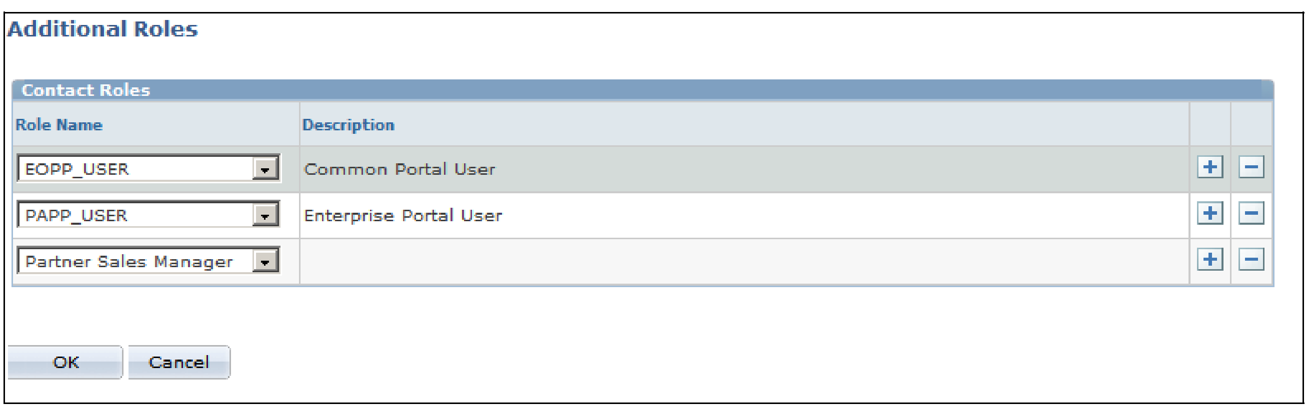


Manage Partner Users

The partner administrator uses this self-service page to administer the users in the partner organization. The administrator can add or delete users and keep track of all users within the partner organization. Multiple roles can be selected for the user. You must add EOPP_USER and PAPP_USER roles to get access to the PeopleSoft system. In addition to these two roles, the Partner Administrator should select additional roles, such as Partner Representative or Partner Sales Manager, as appropriate for each user created. To view, assign, or delete multiple roles for a user, use the Additional Roles icon next to the role drop-down list box.

Adding Multiple Roles for a User

Access the Additional Roles page (click the Additional Roles icon).

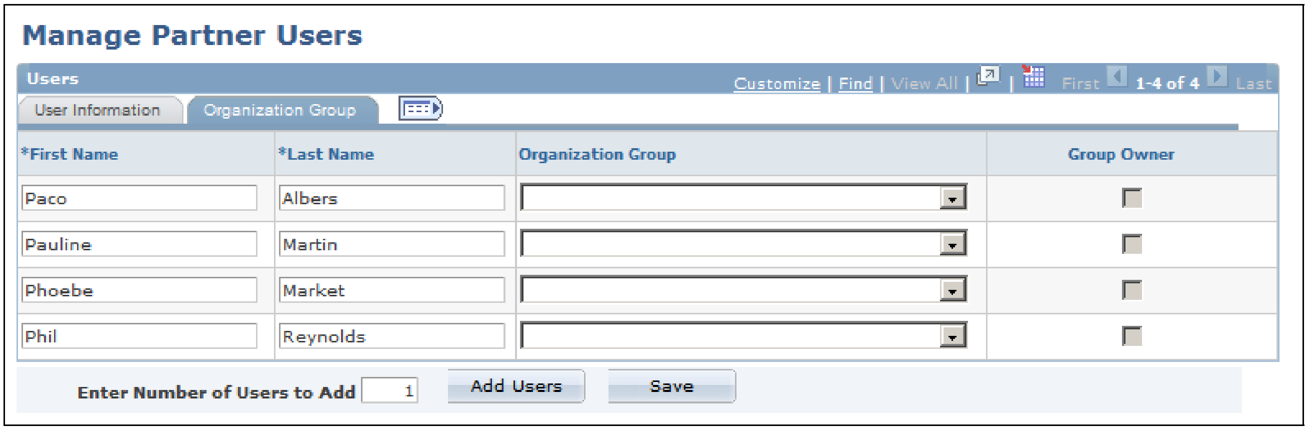


Additional Roles page

You can view all roles for a user and add or delete roles as required.

Maintaining Partner Organization Groups

Access the Manage Partner Users page (Register Users, Register Users, Organization Group).

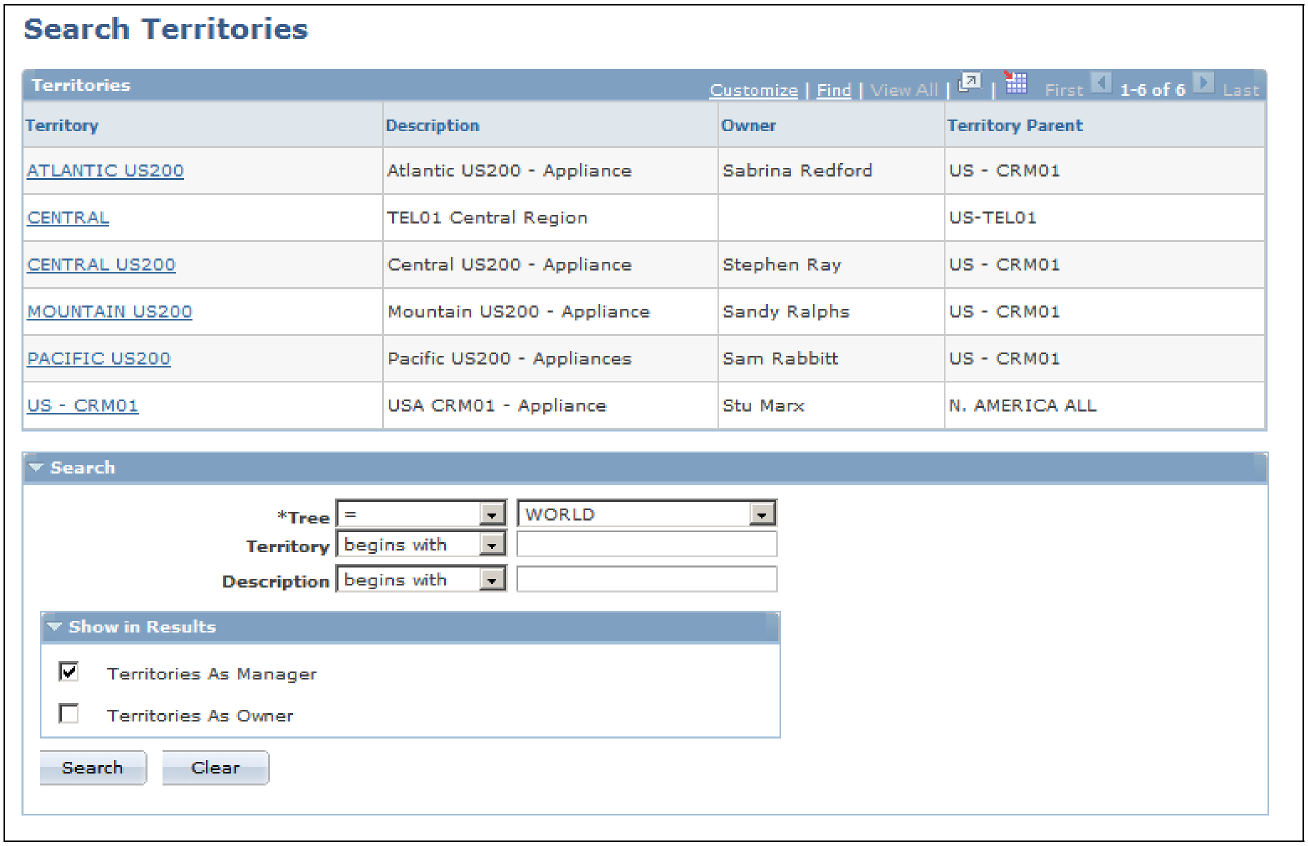


Manage Partner Users page

Partner administrators can view or change the organization group for registered users. Users can also be defined as the Group Owner.

Searching Organization Groups

Access the Search Territories page (Register Users, Search Territories)



Search Territories page

Partner administrators can search for and view organization groups for which they are the manager, the owner, or both.

Chapter 9

Executing Partner Relationship Management Transactions

This chapter provides an overview of partner enabled transactions, and discusses how to:

- Create partner marketing campaigns and add tasks.
- Generate partner leads.
- Add orders and quotes by partners.
- Maintain service management orders by partners.
- View financial accounts.
- Add partners to support cases.

Understanding Partner Transactions

Partner company and contact information is available across the channels supported by PeopleSoft CRM applications. The enterprise can view and assign partner information within the context of many employee or enterprise facing transactions (found in the employee portal registry), customer facing transactions (found in the customer portal registry), and partner facing transactions (found in the partner portal registry). Within the employee facing transactions, partner data can be viewed and updated on the campaign, lead, opportunity, quote, order, service management order and case. Partner data can also be viewed for financial vertical customers on the financial account. Within the customer facing transactions, partner data can be viewed on the order and quote, and updated on the case and product registration transactions. Finally, the partner company is extended a set of transaction to act on behalf of your enterprise. Those transactions include the marketing program or campaign, lead, quote, order, service management order, and view financial account information. There are additional secondary or supporting transactions that a partner has access to as well. Those secondary transactions include product catalog, product configuration, and product advice or recommendations. Additional transactions exposed to the partner include partner profile, partner organization hierarchy and security maintenance.

See and Chapter 5, "Creating and Maintaining Partner Profiles," page 25. and Chapter 4, "Creating Partner Programs," page 13. and Chapter 6, "Setting Up Security for Partners," page 53.

PeopleSoft Partner Portal

We deliver a PeopleSoft Partner Portal which enables partner representatives to transact on behalf of the enterprise using the business processes exposed in the partner portal registry.

The transactions in the PeopleSoft Partner Portal include the ability to:

- View marketing campaigns and adding tasks to marketing campaigns.
- Add and updating leads.
- Add and updating quotes and orders.
- Add service management orders.
- View financial account information for customers.
- Update profile information.

The PeopleSoft Partner portal is delivered with a set of role filtered left hand menu navigation as well as a matching target page navigation page that is represented with function appropriate buttons.

Partner Search

Search functionality has been enhanced to maintain security where the enterprise has exposed partner data across the main CRM transaction set. Maintaining the appropriate level of data access is critical in order to ensure that partners have access to only the customers that they have been secured to view and transact with. With the appropriate level of security defined using the CRM application security framework, the presence of partner data on a transaction will automatically restrict the customer search that takes place so that only the restricted list of customer for the partner is displayed. Additionally, if a customer is entered on a transaction, and subsequent entry of the partner data takes place, the partner prompt will be limited to only those partners that have access to the customer already on the transaction.

Partner and customer search restrictions are in force across all of the transactions covered in this chapter where partner data is exposed.

See and Chapter 8, "Setting Up Distributed Security for Partner Users," page 79. and Chapter 6, "Setting Up Security for Partners," page 53.

Creating Partner Marketing Campaigns

This section provides an overview of partner marketing campaigns and discusses how to:

- Update partner marketing campaigns.
- Update activities for marketing campaigns.
- Update tasks for marketing campaigns.
- View cost information for marketing campaigns.
- View cost information for marketing campaigns.

Understanding Partner Marketing Campaigns

By extending marketing functionality to PeopleSoft Partner Relationship Management, we enable the Enterprise Channel Manager to add partner members to an activity team and add partner companies to a list of sponsors. Within the partner organization, a partner manager can view lists of marketing programs or campaigns, and add tasks and notes to a marketing campaign (marketing program). The Enterprise Channel Manager can add partners to program teams, define promotional pricing for partners, disable the Audience icon on the Wave Detail page so the partner cannot access the audience, and allow partners to have display-only access to offers, tasks and costs.

The two types of marketing campaigns where partners are involved are joint marketing campaigns and marketing campaigns targeted at partners.

Joint Marketing Campaigns with Partners

To create a joint marketing program with a partner, the enterprise users can add partners to marketing programs. Partners themselves cannot create marketing programs. Once a partner has been added to a marketing program, the partner can access the program and they can perform restricted tasks based on their security level.

Note. A partner user cannot create a new marketing campaign in PeopleSoft Marketing. If they log in to the enterprise partner portal system as a partner user, security dictates that the relevant buttons and fields are unavailable to them.

Marketing Campaigns Targeted at Partners

The process of creating a marketing campaign directed solely at partners simply involves selecting audiences that consist of partners and creating marketing campaigns for them. The process of creation does not differ from the process that one would follow to create a regular marketing campaign.

See Also

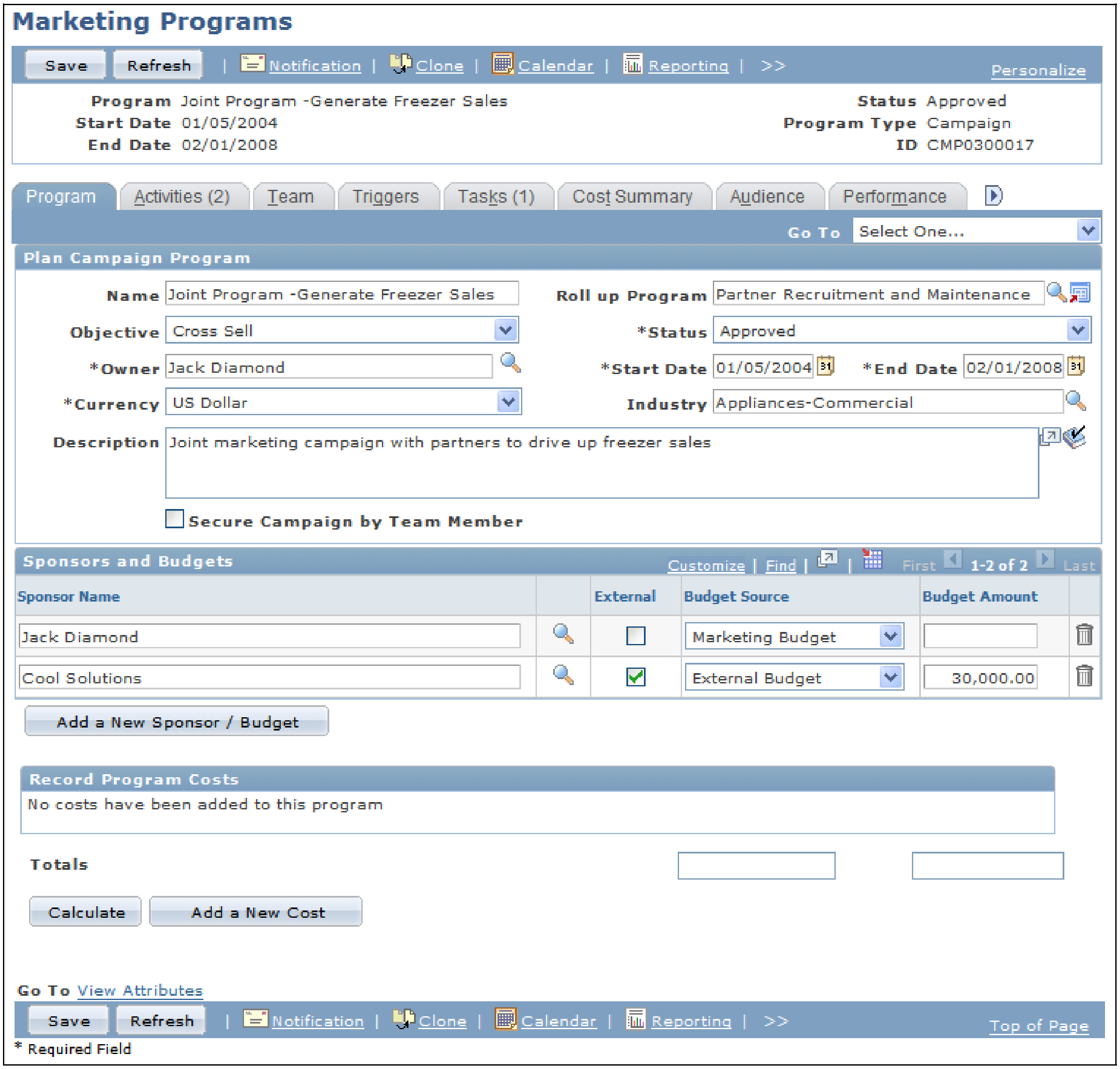
PeopleSoft CRM 9.1 Marketing Applications PeopleBook, "Creating Campaigns and Activities"

Pages Used to Update Partner Marketing Campaigns

Page Name	***Definition Name***	***Navigation***	***Usage***
Marketing Programs — Programs	RA_CAMPAIGN_DETAIL	Partner Portal, Marketing Programs, Marketing Programs	Create or view a joint partner marketing campaign.
Marketing Programs — Activities	RA_CMPGN_ACTIVITY	Partner Portal, Marketing Programs, Activities	View marketing campaign activities.
Marketing Programs — Triggers	RA_CAMPAIGN_TRIGER	Partner Portal, Marketing Programs, Triggers	View summary information about existing triggers and add new triggers.
Marketing Programs — Tasks	RA_CAMPAIGN_TASK	Partner Portal, Marketing Programs, Tasks	Add tasks to marketing campaigns.
Marketing Programs — Cost Summary	RA_CAMPAIGN_COSTS	Partner Portal, Marketing Programs, Cost Summary	View marketing campaign costs.
Marketing Programs — Audience	RA_CM_LIST_SUMRY	Partner Portal, Marketing Programs, Audience	Attach target audience lists to campaigns.
Marketing Programs — Performance	RA_CMPGN_METRICS	Partner Portal, Marketing Programs, Performance	View marketing campaign performance.
Marketing Programs — Notes	RA_CMPGN_Notes	Partner Portal, Marketing Programs, Notes	Add notes and attachments to marketing campaigns.

Updating Partner Marketing Campaigns

Access the Marketing Programs page (Partner Portal, Marketing Programs, Marketing Programs).



Marketing Programs page

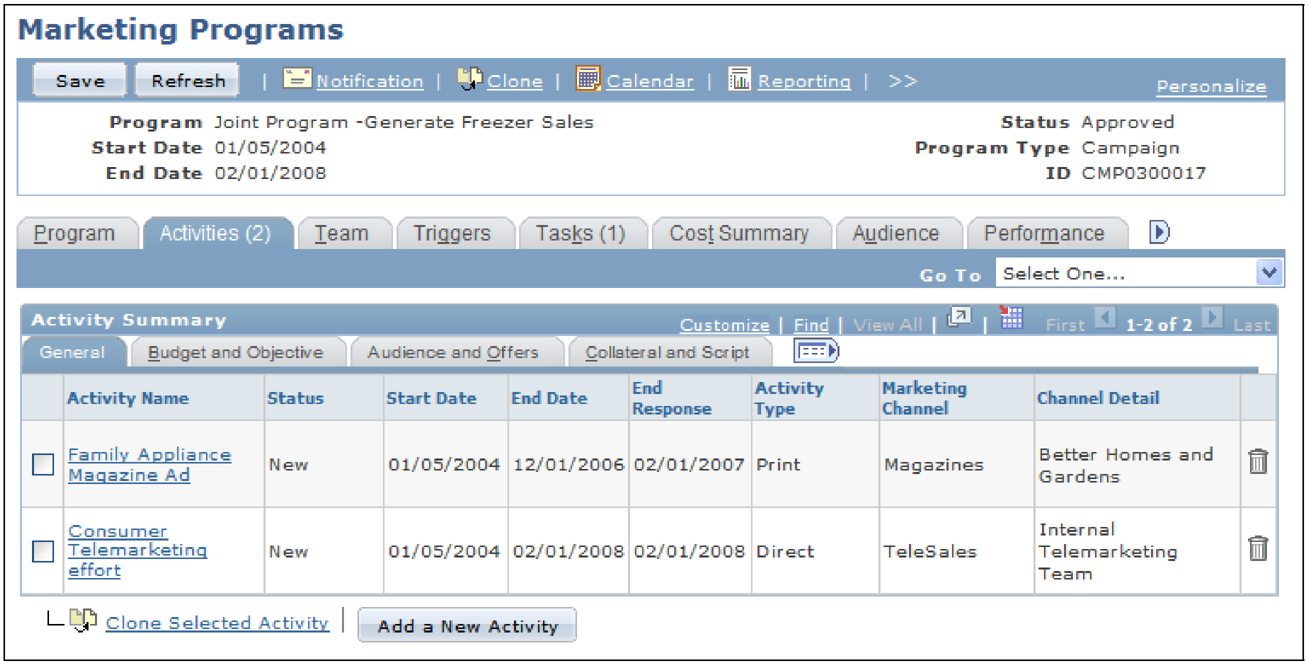
Note. The Activities, Triggers, Audience, and Performance pages—normally available in the Marketing component—are unavailable to partners. All other Marketing Programs pages are display-only for partners. For Tasks, partners can only view and modify tasks that they created or that were assigned or reassigned to them.

See Also

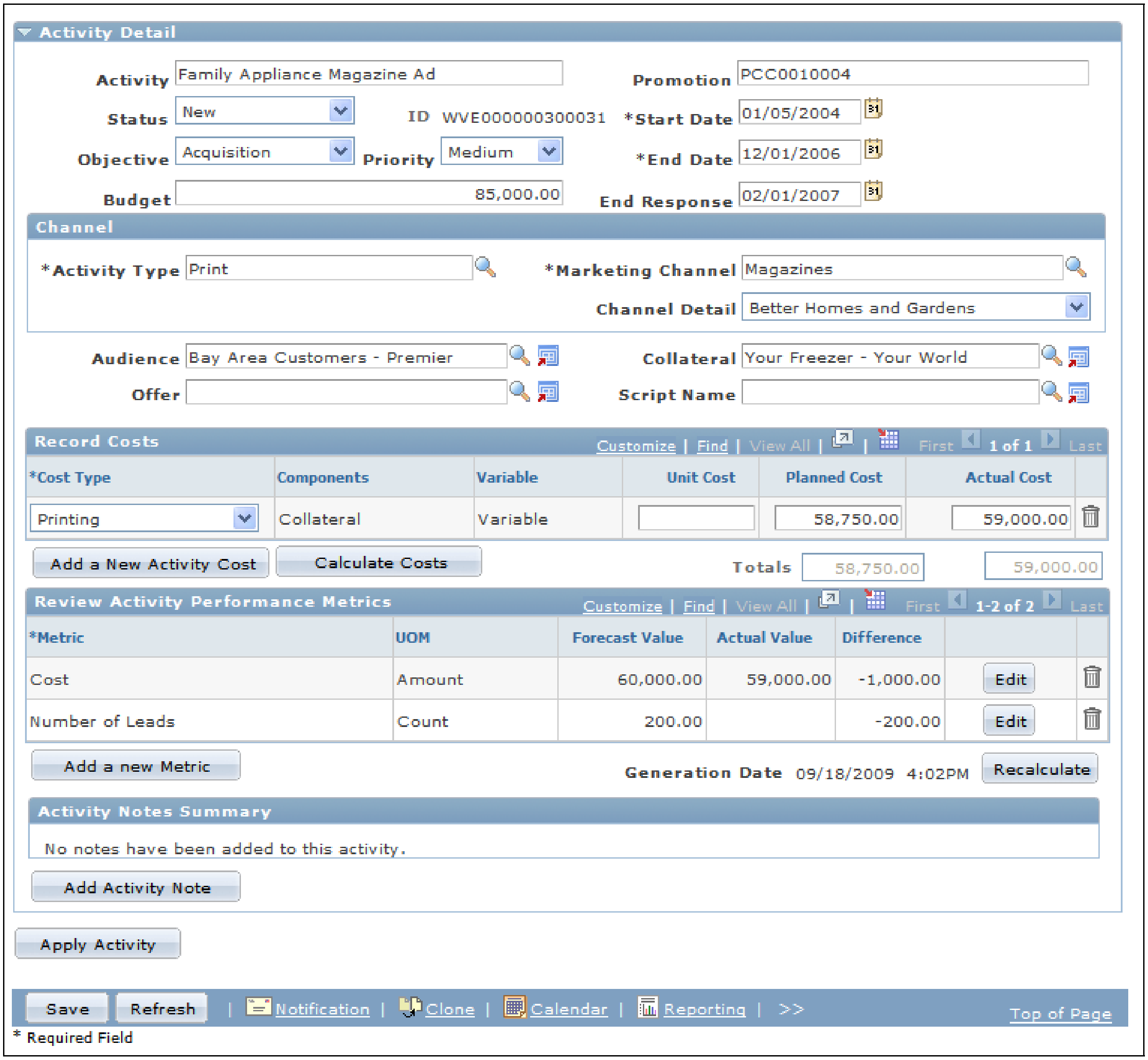
PeopleSoft CRM 9.1 Marketing Applications PeopleBook, "Creating Campaigns and Activities," Creating Campaigns

Updating Activities for Marketing Campaigns

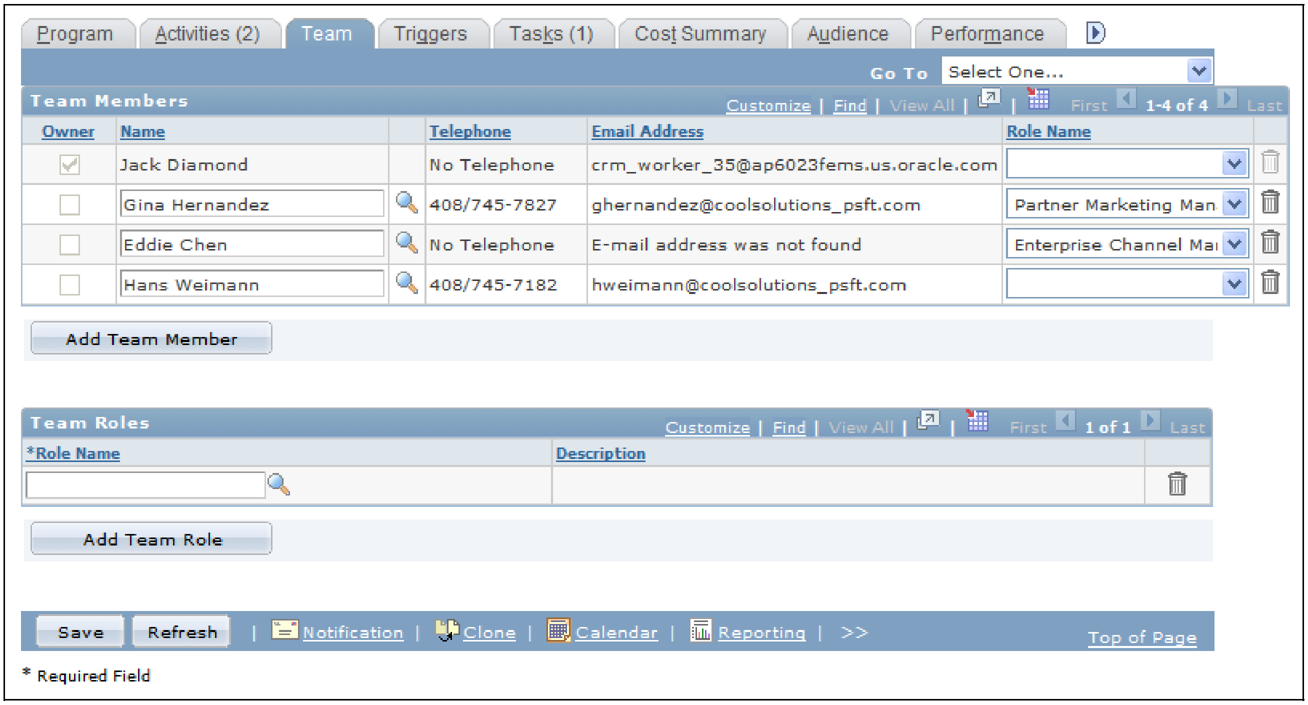
Access the Marketing Programs — Activities page (Partner Portal, Marketing Programs, Activities).



Marketing Programs — Activities page (1 of 3)



Marketing Programs — Activities page (2 of 3)



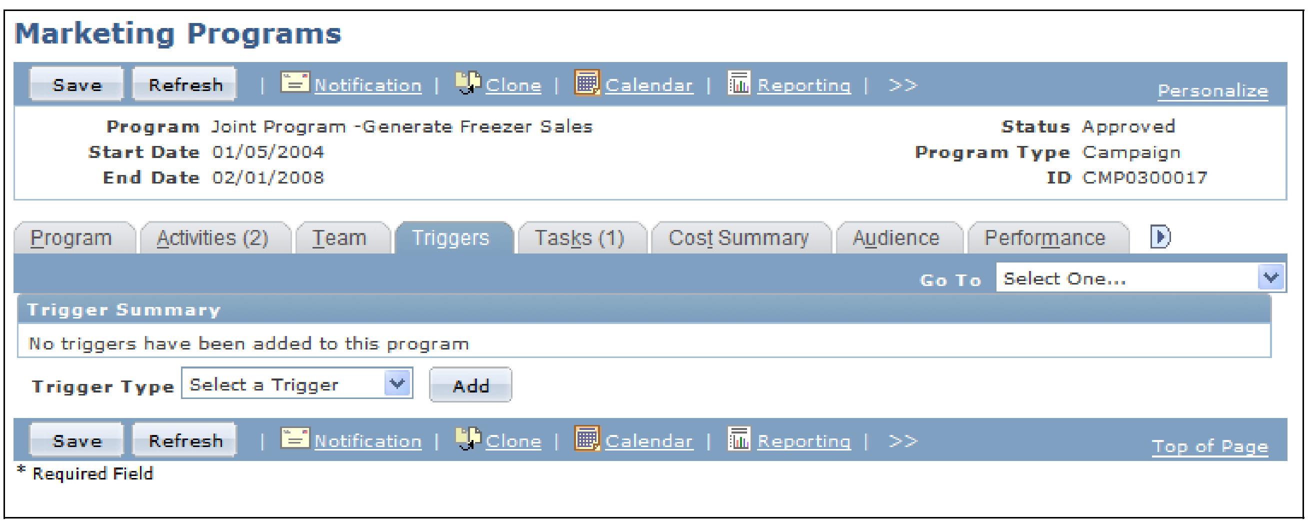
Marketing Programs — Activities page (3 of 3)

Explanations of these fields are provided in the *PeopleSoft CRM 9.1 Marketing Applications PeopleBook.*

See and *PeopleSoft CRM 9.1 Marketing Applications PeopleBook*, "Creating Campaigns and Activities," Defining Activities.

Updating Triggers

Access the Marketing Programs — Triggers page (Partner Portal, Marketing Programs, Triggers).



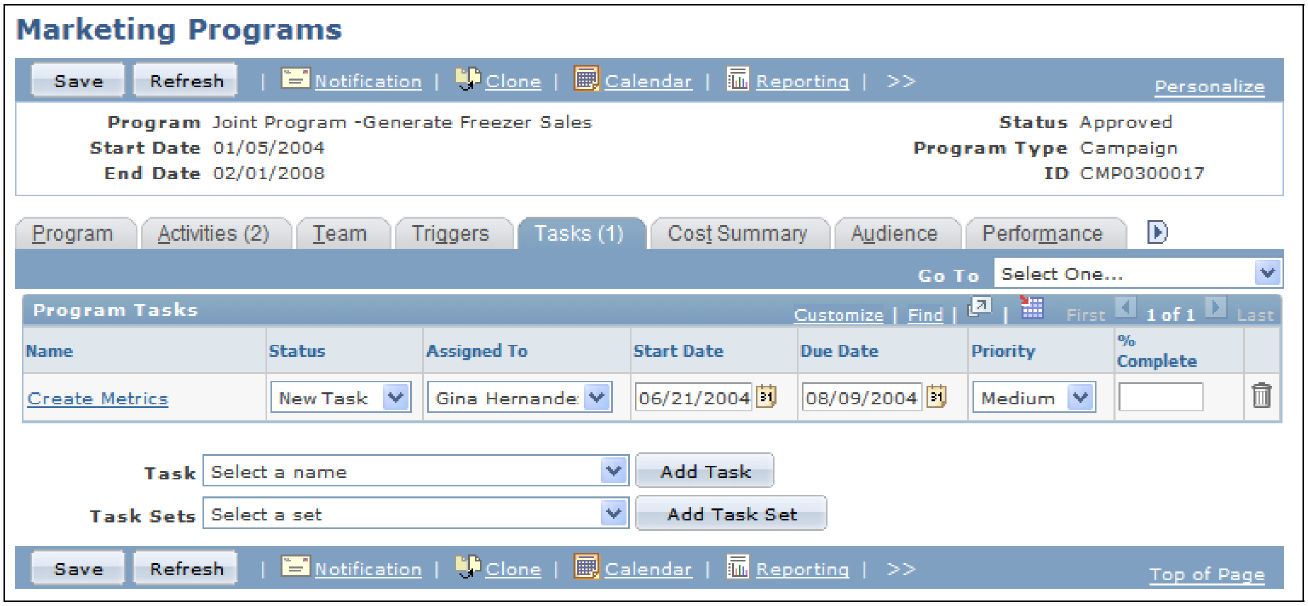
Marketing Programs — Triggers page

Explanations of these fields are provided in the *PeopleSoft CRM 9.1 Marketing Applications PeopleBook.*

See and *PeopleSoft CRM 9.1 Marketing Applications PeopleBook*, "Creating Campaigns and Activities," Defining a Trigger.

Updating Tasks

Access the Marketing Programs — Tasks page (Partner Portal, Marketing Programs, Tasks).



Marketing Programs — Tasks page

Tasksand **Task Sets** Partners can add these to the marketing campaign.

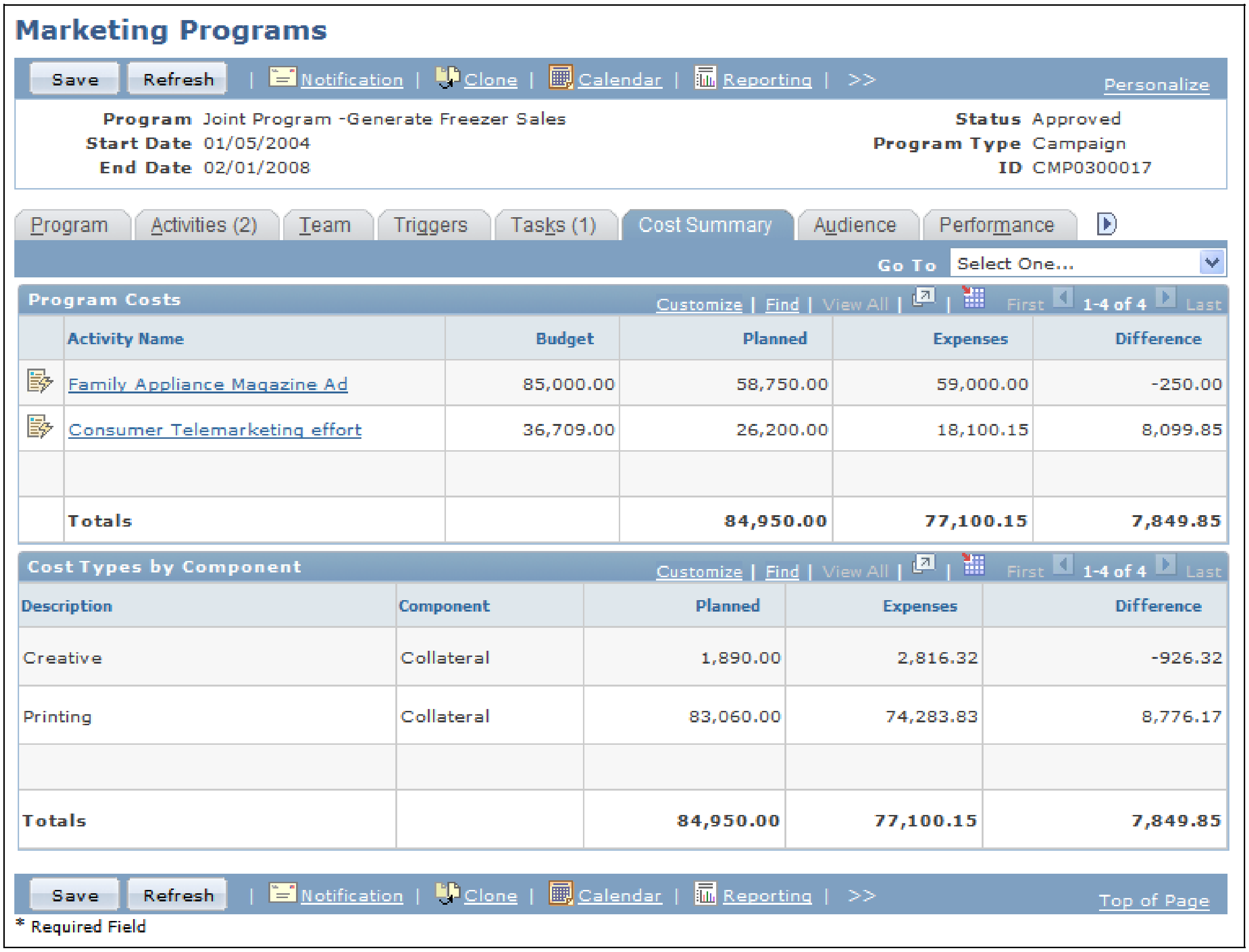
Explanations of these fields are provided in the *PeopleSoft CRM 9.1 Marketing Applications PeopleBook.*

See Also

PeopleSoft CRM 9.1 Marketing Applications PeopleBook, "Creating Campaign Collateral"

Viewing Cost Information

Access the Marketing Programs — Cost Summary page (Partner Portal, Marketing Programs, Costs).



Marketing Programs — Cost Summary page

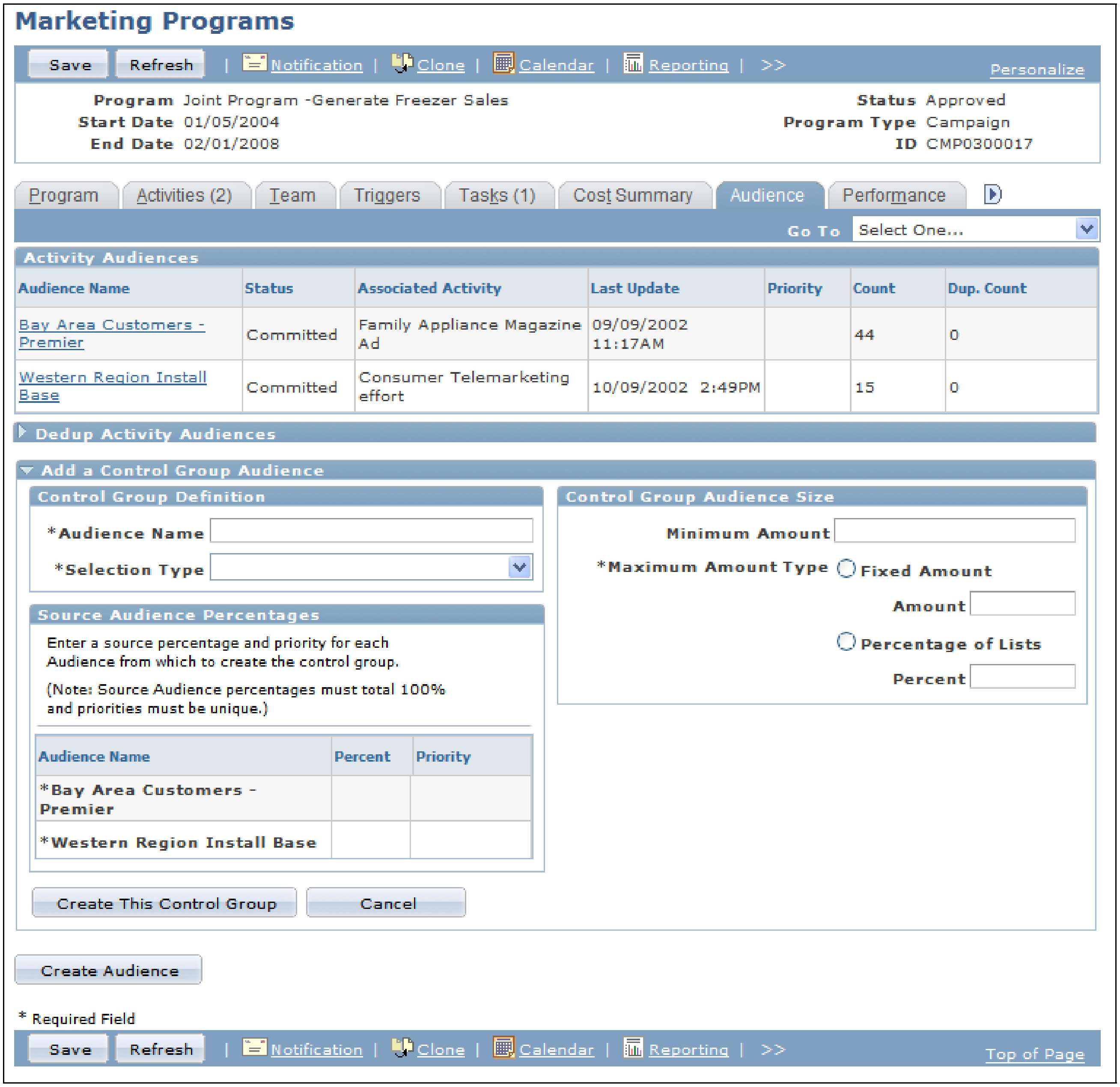
Explanations of these fields are provided in the *PeopleSoft CRM 9.1 Marketing Applications PeopleBook.*

See Also

PeopleSoft CRM 9.1 Marketing Applications PeopleBook, "Creating Campaign Collateral"

Attaching Target Audience Lists

Access the Marketing Programs — Audience page (Partner Portal, Marketing Programs, Audience).



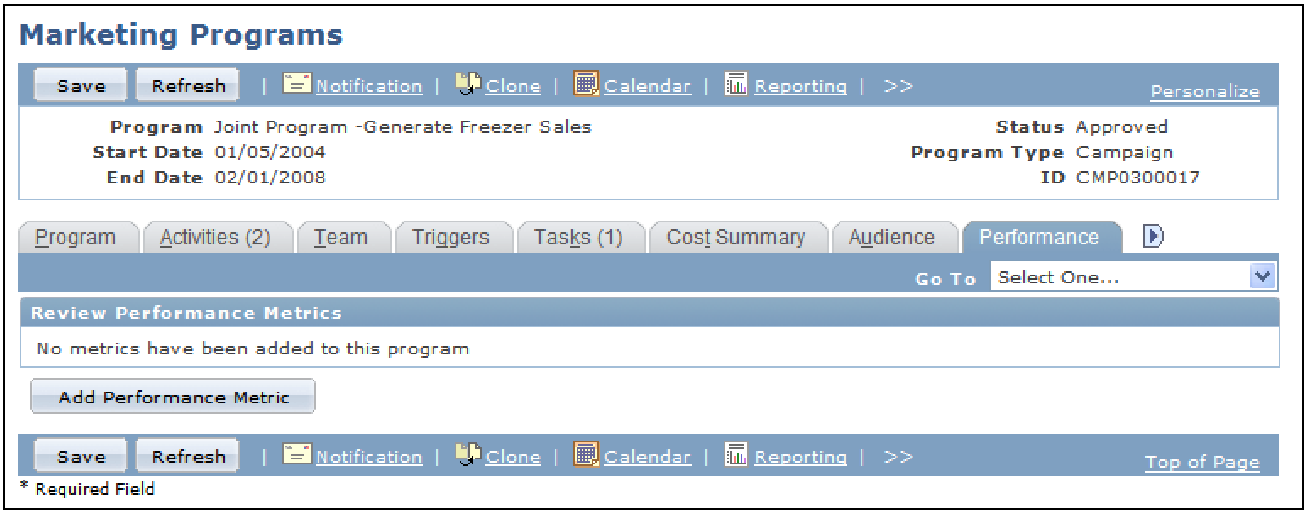
Marketing Programs — Audience page

Explanations of these fields are provided in the *PeopleSoft CRM 9.1 Marketing Applications PeopleBook.*

See and *PeopleSoft CRM 9.1 Marketing Applications PeopleBook*, "Creating Campaigns and Activities," Working with Campaign Audiences.

Viewing Performance for Marketing Campaigns

Access the Marketing Programs — Performance page (Partner Portal, Marketing Programs, Performance).



Marketing Programs — Performance page

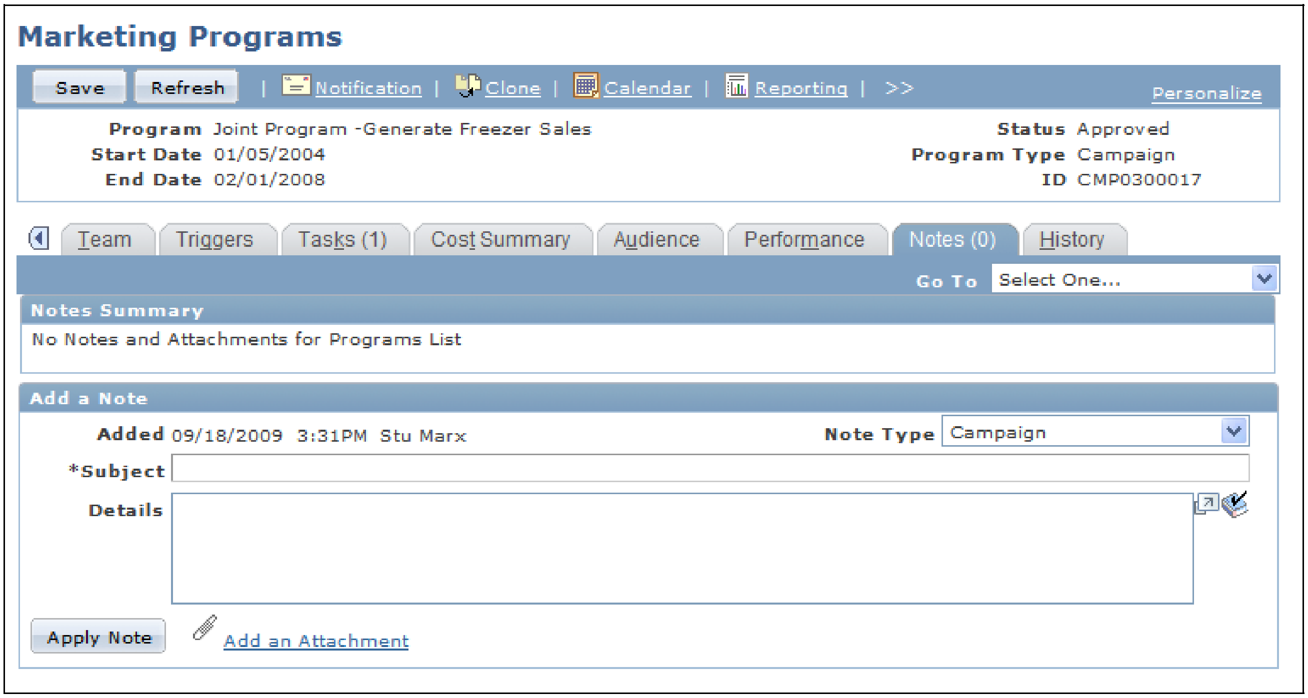
Explanations of these fields are provided in the *PeopleSoft CRM 9.1 Marketing Applications PeopleBook.*

See Also

PeopleSoft CRM 9.1 Marketing Applications PeopleBook, "Creating Campaign Collateral"

Adding Notes and Attachments to Marketing Campaigns

Access the Marketing Programs — Notes page (Partner Portal, Marketing Programs, Notes).



Marketing Programs — Notes page

Explanations of these fields are provided in the *PeopleSoft CRM 9.1 Marketing Applications PeopleBook.*

See Also

PeopleSoft CRM 9.1 Marketing Applications PeopleBook, "Creating Campaign Collateral"

Generating Partner Leads

This section provides an overview of partner lead functionality and explains how to:

- Generate partner leads.
- Add assignments.
- Add products to the lead.
- Add notes and attachments to the lead.

Understanding Partner Functionality in PeopleSoft Sales

Your enterprise may choose to extend your sales channel to a partner company. In doing so, the partner company and it's partner representatives will therefore need access to the lead component in order to be assigned leads and manage lead information. In order to receive lead assignments, the partner should be represented on the territory tree . The automatic assignment rules will look across the partner and enterprise sales representatives and assign the best representative to the lead. These rules are configured by the enterprise. As soon as a lead has been assigned to a partner company and representative, the lead is viewable within the partner portal. The partner will not have access to the same lead information as the enterprise user. A partner has access to only those leads that he has been assigned, and has customer access within the lead transaction to only those customers or consumers that he has been granted access to.

Sales representatives and or partner representatives can be added to leads manually or automatically. If they are added automatically, the system does the following:

1. If there is currently an enterprise sales representative that is marked as primary and the assignment engine finds a different primary one, the system will replace the current primary sales representative with the new sales representative.
2. If both the enterprise sales representative and partner representative are marked as primary, the system will replace the primary depending upon who is selected as primary by the Assignment Engine.
3. If there is an enterprise sales representative and partner representative, the system will replace the current primary. For example, if the sales representative is currently the primary and the Assignment Engine sends the partner representative as the primary, the enterprise sales representative is replaced by the partner representative.

Note. Partner sales representatives do not have to be sales users in order to be assigned.

To secure your enterprise, partner restrictions are applied to the PeopleSoft Sales system. When the Enterprise Channel Manager is searching for customers and partners in the context of the lead or opportunity transactions, the following security is enforced:

- Search for a customer and later search for a partner. Partners are restricted to the authorized list of customers.
- Search for a partner and later search for a customer. Customers are restricted to the authorized list of partners.
- Change the Business Unit and search for the customer and partner. The setID should restrict customer and partners.

Note. The system is not delivered with security on the contacts, sites, and partner sales representatives or enterprise sales representatives. Security should prevent the 'Primary' selection in the Sales Team to only those partners authorized for the customer. Security is not enforced if there is no customer or partner identified. For example if the Enterprise Channel Manager searches for a customer without a partner, the entire list of customers will display.

When entering a new lead or opportunity in the enterprise, if only a partner is involved in the lead, the following is enforced:

- The representative who is entering the lead is defaulted as the primary sales representative.

- A partner with a contact can be selected from the main page. The contact of the partner will be defaulted in the Sales Team as a 'Primary' representative for the partner.
- When adding the partner, you can search for the Partner Reps from all partner companies filtered by setID. You can select multiple contacts from the list for the partner company.
- If partners are added automatically, the partner sales representatives found by the assignment engine will be added to the sales team. If the assignment engine finds the match on the 'Primary' sales representative, the partner will be marked as 'Primary'.

If both an enterprise and partner sales representative are involved:

- An enterprise and a partner sales representative can both be marked as Primary.

  Note. If there are more than two sales representatives in the Assign page, changing the Primary enterprise or partner representative will insert a new row or update an existing row for the new primary representative

- If partners are added automatically and both enterprise and partner sales representatives are already in the 'Assign' page and marked as Primary, the assignment engine may find a different primary representative. If so, the existing representatives will not be removed from the sales team, but will be updated as non-primary.

Partner Leads in the PeopleSoft Partner Portal

Lead functionality is exposed in the PeopleSoft Partner Portal and is scaled to fit the partner role. Some of the options available in the enterprise are not available in the PeopleSoft Partner Portal in order to simplify the user experience and limit the features and functions to only those that the partner should be performing.

The partner can only select from a restricted list of customers. Partners cannot add contacts unless a customer is identified on the lead and only the contacts of the customer can be added.

If the partner is the primary representative:

- The primary partner and partner contact are display only from the Discover page.
- Only the primary partner contact can delete or change the sales team on the lead.
- Only the primary partner contact can change the primary sales team member to a team member from his or her own partner company.
- Any team member viewing the lead can add more team members from his or her own partner company.
- The partner can change the status for the lead.

  Note. If the lead is turned back, the system will remove the primary partner from the sales team. A new primary contact from the same partner company as the Partner who is signed in will be added when the page is saved. If none was found, the lead will be given to an enterprise sales representative if there is one, or it will be left unassigned.

If the partner is not the primary representative:

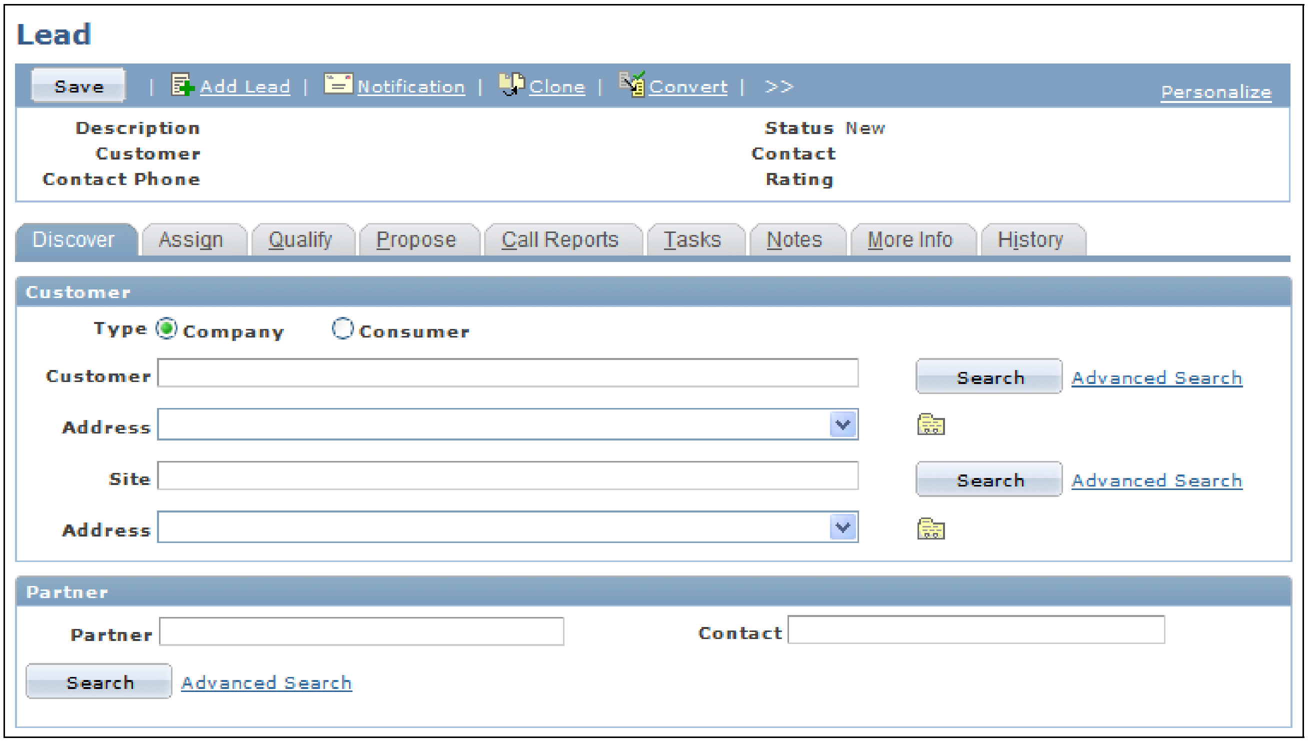
- The partner sales representatives will only be able to view the Discover, Propose and Notes pages.
- The partner sales representatives will still be to add more team members from their own partner company.

Pages Used to Generate Partner Leads

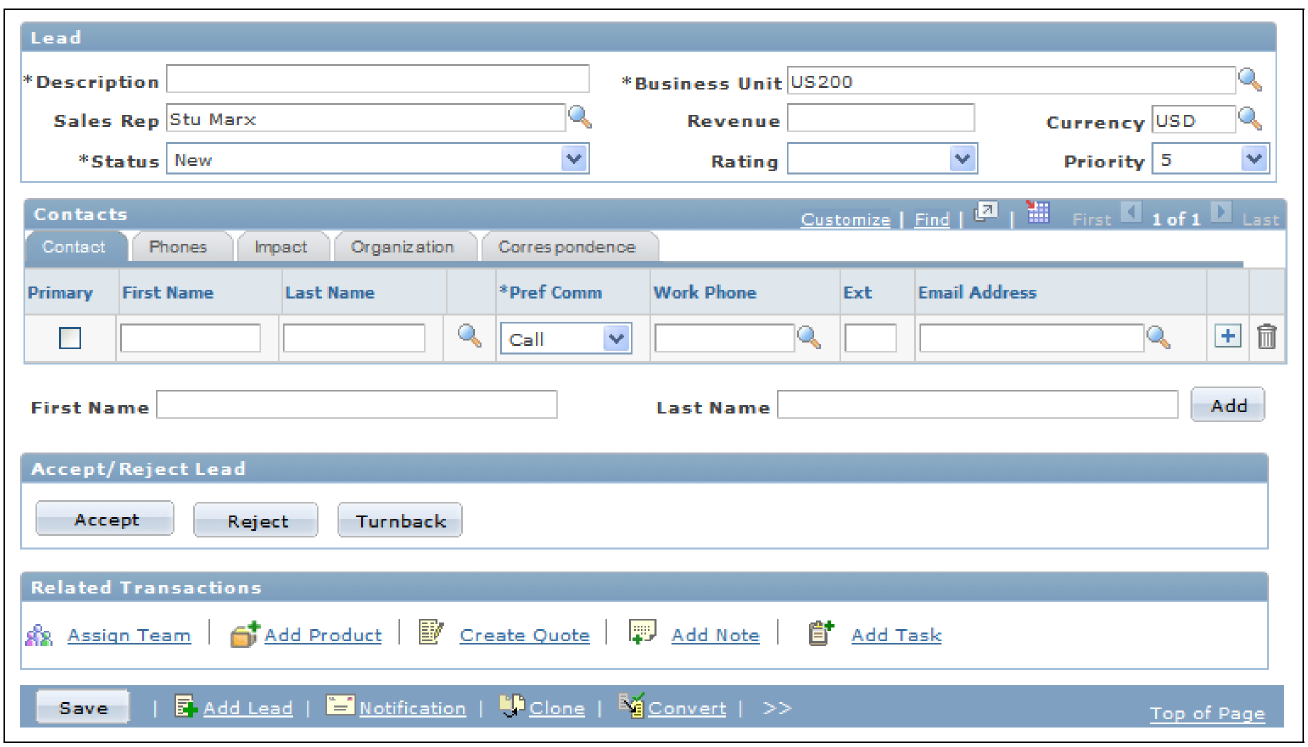
Page Name	***Definition Name***	***Navigation***	***Usage***
Search Leads	RSF_LEADS_HOME_GRD	Partner Portal, Search Leads	Use to search for leads.
Lead - Discover	RSF_LEAD_ENTRY	Sales, Add Lead	Enter details about a sales lead, including the name, status, and rating, and the customer's name, address, and contact people.
Lead - Assign	RSF_LEAD_ASSIGN	Sales Portal, Add Lead Select the Assign tab on the Lead — Discover page.	Assign the sales representative to the lead.
Lead - Propose	RSF_LEAD_PROPOSE	Select the Propose tab on the Lead — Discover page.	Select products and prices for the proposal for the lead.
Lead — Notes	RSF_LEAD_NOTES	Select the Notes tab on the Lead — Discover page.	Enter notes and attachments about the lead.

Generating Partner Leads

Access the Lead — Discover page (Sales, Add Lead).



Lead — Discover page (1 of 2)



Lead — Discover page (2 of 2)

A partner representative can create brand new leads or be assigned existing leads created by the enterprise.

Note. The display template configuration is set to display the partner information in the Lead Details section. The display template can be configured to add a new section for the partner data.

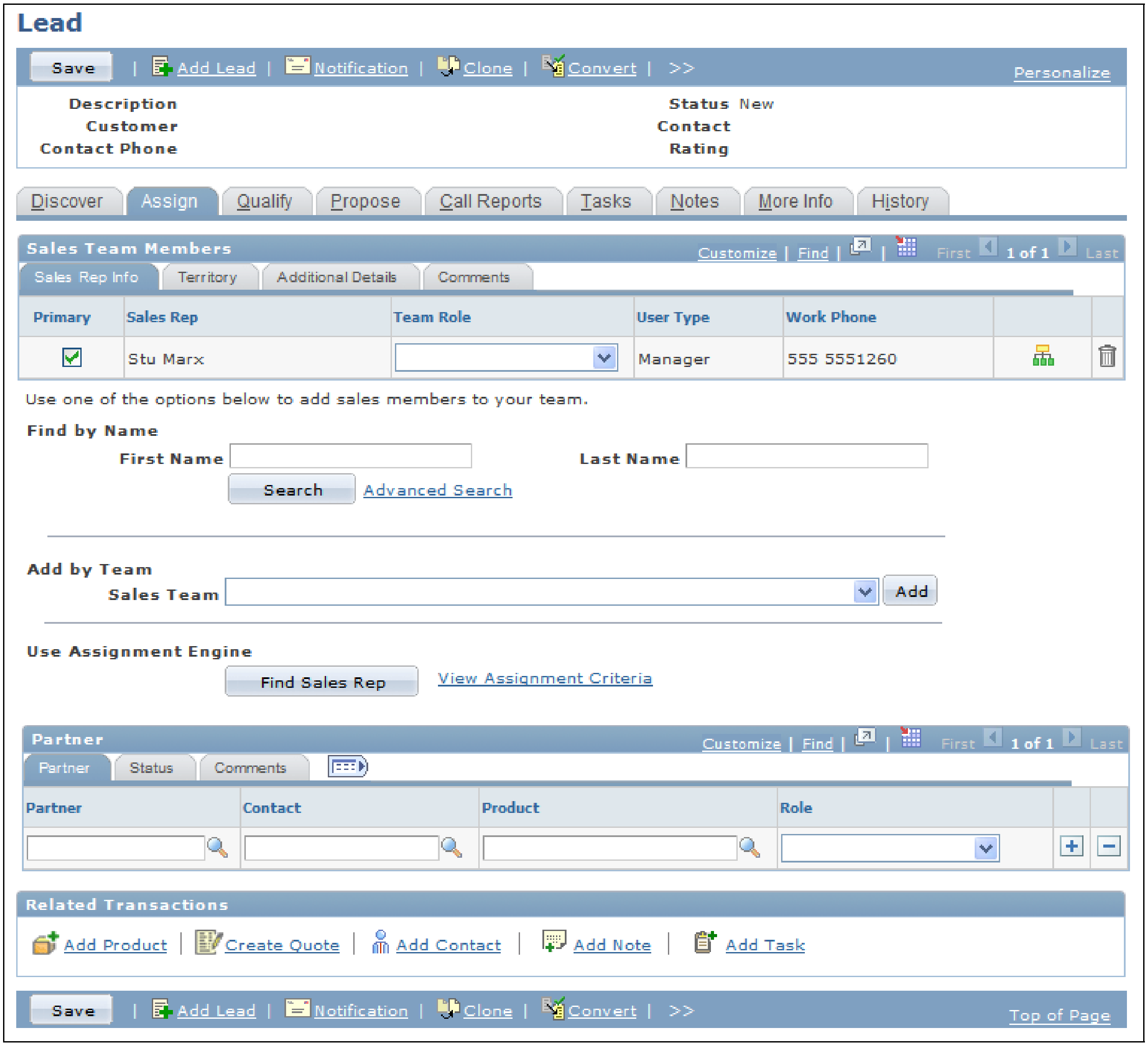
An explanations of these fields are provided in the *PeopleSoft Sales 9.1 PeopleBook.*

See Also

PeopleSoft Sales 9.1 PeopleBook, "Creating Sales Leads and Opportunities"

Adding Assignments

Access the Lead — Assign page (select the Assign tab on the Lead — Discover page).



Lead — Assign page

On the assignment tab, the partner can assign additional partner reps and remove non-primary partner representatives.

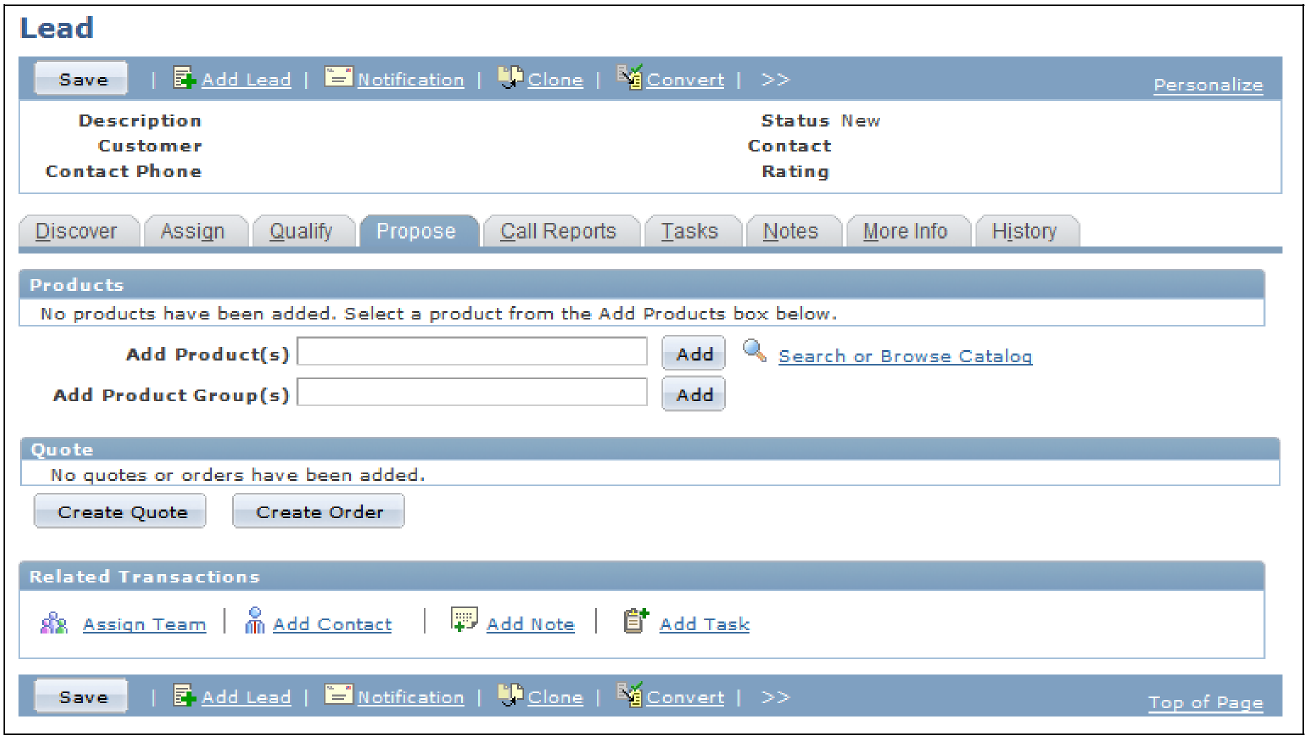
Additional explanations of these fields are provided in the *PeopleSoft Sales 9.1 PeopleBook.*

See Also

PeopleSoft Sales 9.1 PeopleBook, "Creating Sales Leads and Opportunities"

Adding Products to the Lead

Access the Lead — Propose page (select the Propose tab on the Lead — Discover page).



Lead — Propose page

The partner representative has the ability to assign or remove products from the lead, and convert a lead to a quote or an order.

Additional explanations of these fields are provided in the *PeopleSoft Sales 9.1 PeopleBook.*

See Also

PeopleSoft Sales 9.1 PeopleBook, "Creating a Proposal for a Lead or Opportunity," Selecting Products and Prices for a Proposal

Adding Notes and Attachments to the Lead

Access the Lead — Notes page (select the Propose tab on the Lead — Discover page).

Explanations of these fields are provided in the *PeopleSoft Sales 9.1 PeopleBook.*

See Also

PeopleSoft Sales 9.1 PeopleBook, "Creating Sales Tasks and Adding Notes for a Lead or Opportunity," Adding Notes and Attachments

Adding Orders and Quotes by Partners

This section provides an overview of partner orders and quotes and explains how a partner can:

- Enter orders.
- Access product recommendations.
- Check availability and price.
- Enter line details.
- View and remove holds.
- View notes.
- View related actions.
- View order history.

Orders and Quotes

Many of the options and pages available to the partner when entering an order from the PeopleSoft Partner Portal are the same as when an order is entered by a CSR during order entry. The differences are listed in this section.

When a partner enters an order or quote, they can only select from customers and products that they have been given access using the CRM application security framework.

Depending on how you set up hold processing, partners may be able to release some orders from hold status to expedite fulfillment.

Hold codes pertaining to partners are available to use in the following situations:

- The partner is placing an order for a product that exists in his catalog but not in the customer's catalog.
- Minimum or maximum order total amounts for a specific partner. When the order is outside of these limits, the order is placed on hold.
- If the partner is allowed to apply a manual price adjustment, the order will go on hold if the manual discount or surcharge is greater than what the partner is allowed to give.
- If the partner name is specified but the partner contact field is empty, the order will go on hold.
- If configured products are added to the order, the order will go on hold.
- If the partner places an order for resale, the tax-exempt certificate should be included or the order will go on hold.

All of the hold codes can be edited or deleted. For example, you may decided that configured products that are ordered by partners do not need to be reviewed before the hold code is removed.

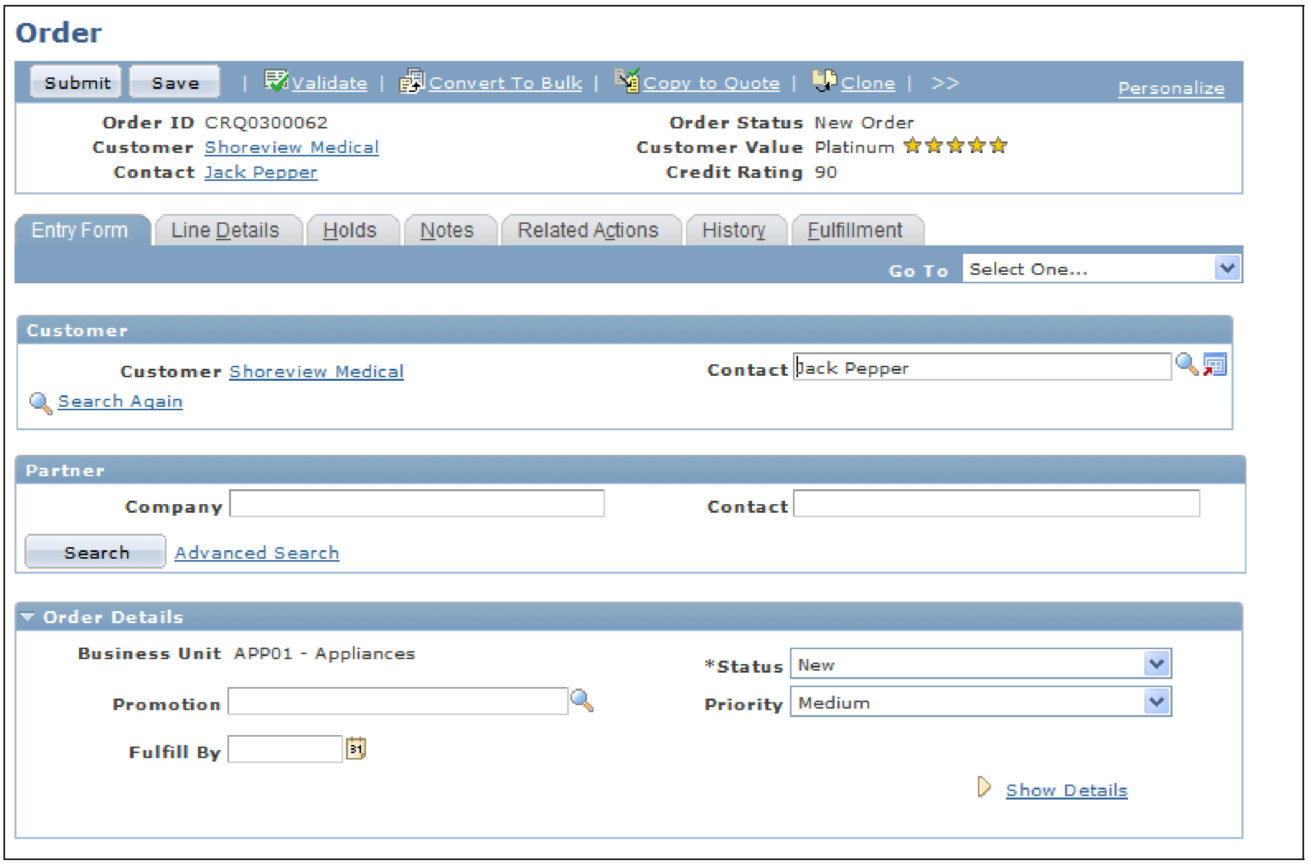
Pages Used to Enter Orders and Quotes by Partners

Page Name	***Definition Name***	***Navigation***	***Usage***
Search	RO_SEARCH_UPDATE	Partner Portal, Search Orders and Quotes	Search for orders and quotes.
Order — Entry Form Quote — Entry Form	RO_FORM	• Partner Portal, Add Order • Partner Portal, Add Quote	As a partner, enter an order or quote for a customer.
Product Advisor List	RO_LISTDISP_SEC	Click the Get Recommendations link on the Quote - Entry Form or Order - Entry Form page.	Select a catalog from the list of catalogs available. You can then launch Advisor dialogs that are associated to the catalog.
Check Availability and Pricing	RO_FORM	Click the Availability tab on the Quote - Entry Form or Order - Entry Form page. Then click the Check Availability link.	Create partial shipments, add promotion codes, or view pricing details for order lines.
Line Details	RO_CAPTURELINE_DTL	Click the Line Details tab in the Order Details or Quote Details section on the Quote - Entry Form or Order - Entry Form page.	Check product availability. Partners can edit line details such as unit of measure, order quantity, unit price, promotion code and apply manual adjustments. They can also allow partial shipment for this product.
Entry Form — Holds	RO_HOLD	Click the Holds tab in the Order Details or Quote Details section on the Quote - Entry Form or Order - Entry Form page.	Use to view and remove holds for the order.
Notes	RO_NOTE	Click the Notes tab in the Order Details or Quote Details section on the Quote - Entry Form or Order - Entry Form page.	Use to view or add notes to the order.
Related Actions	RO_ASSOCIATION	Click the Related Action tab in the Order Details or Quote Details section on the Quote - Entry Form or Order - Entry Form page.	View related actions for the order, such as a business project that is somehow related to the order or quote.

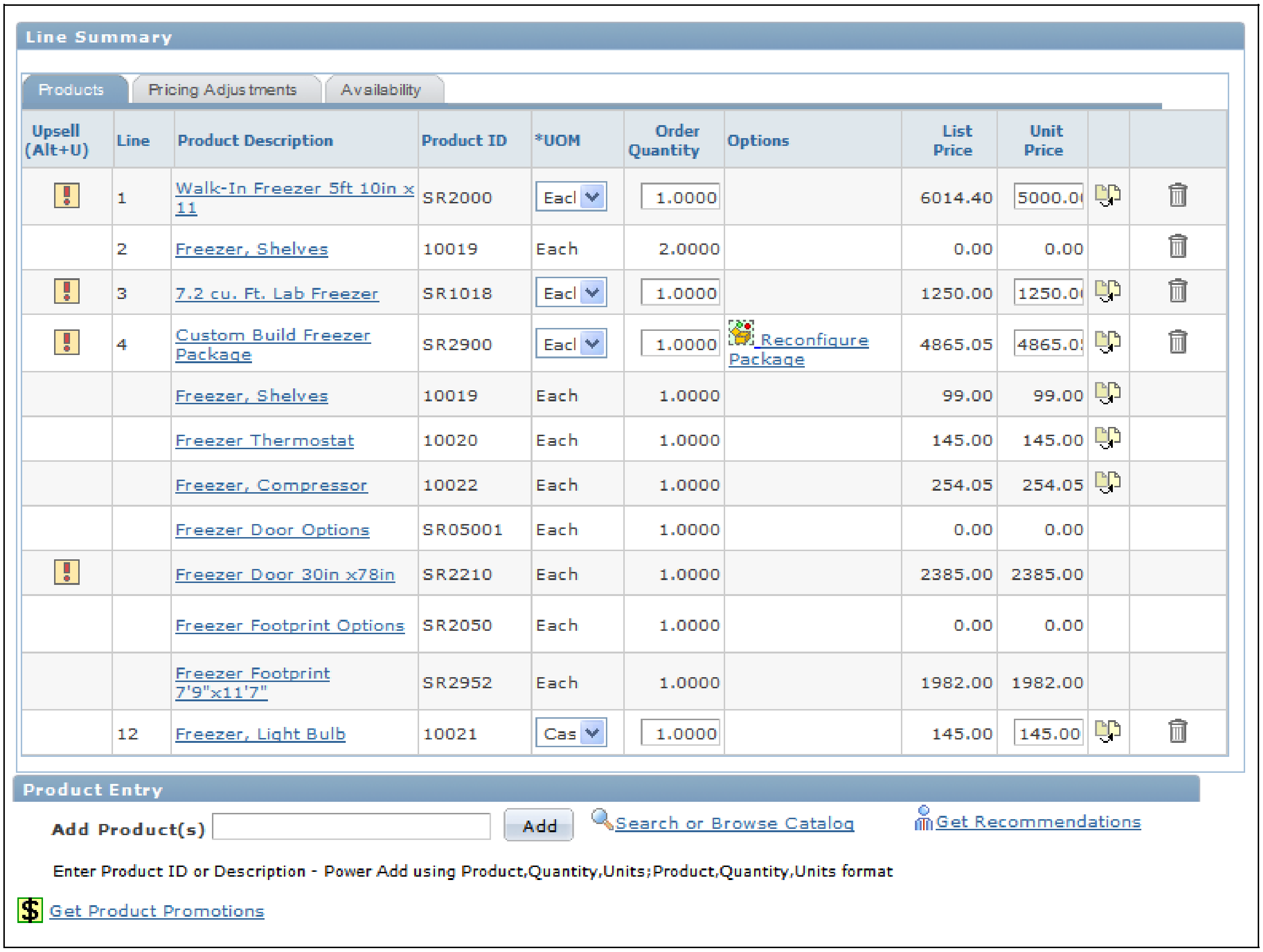
Page Name	*Definition Name*	*Navigation*	*Usage*
History	RO_HISTORY	Click the History tab in the Order Details or Quote Details section on the Quote - Entry Form or Order - Entry Form page.	View changes or communication about the order.

Entering Orders

Access the Order — Entry Form page (Partner Portal, Add Order).



Order — Entry Form page (1 of 3)



Line Summary

Products | Pricing Adjustments | Availability

Upsell (Alt+U)	Line	Product Description	Product ID	*UOM	Order Quantity	Options	List Price	Unit Price		
!	1	Walk-In Freezer 5ft 10in x 11	SR2000	Eacl	1.0000		6014.40	5000.0(		
	2	Freezer, Shelves	10019	Each	2.0000		0.00	0.00		
!	3	7.2 cu. Ft. Lab Freezer	SR1018	Eacl	1.0000		1250.00	1250.0(		
!	4	Custom Build Freezer Package	SR2900	Eacl	1.0000	Reconfigure Package	4865.05	4865.0!		
		Freezer, Shelves	10019	Each	1.0000		99.00	99.00		
		Freezer Thermostat	10020	Each	1.0000		145.00	145.00		
		Freezer, Compressor	10022	Each	1.0000		254.05	254.05		
		Freezer Door Options	SR05001	Each	1.0000		0.00	0.00		
!		Freezer Door 30in x78in	SR2210	Each	1.0000		2385.00	2385.00		
		Freezer Footprint Options	SR2050	Each	1.0000		0.00	0.00		
		Freezer Footprint 7'9"x11'7"	SR2952	Each	1.0000		1982.00	1982.00		
	12	Freezer, Light Bulb	10021	Cas	1.0000		145.00	145.00		

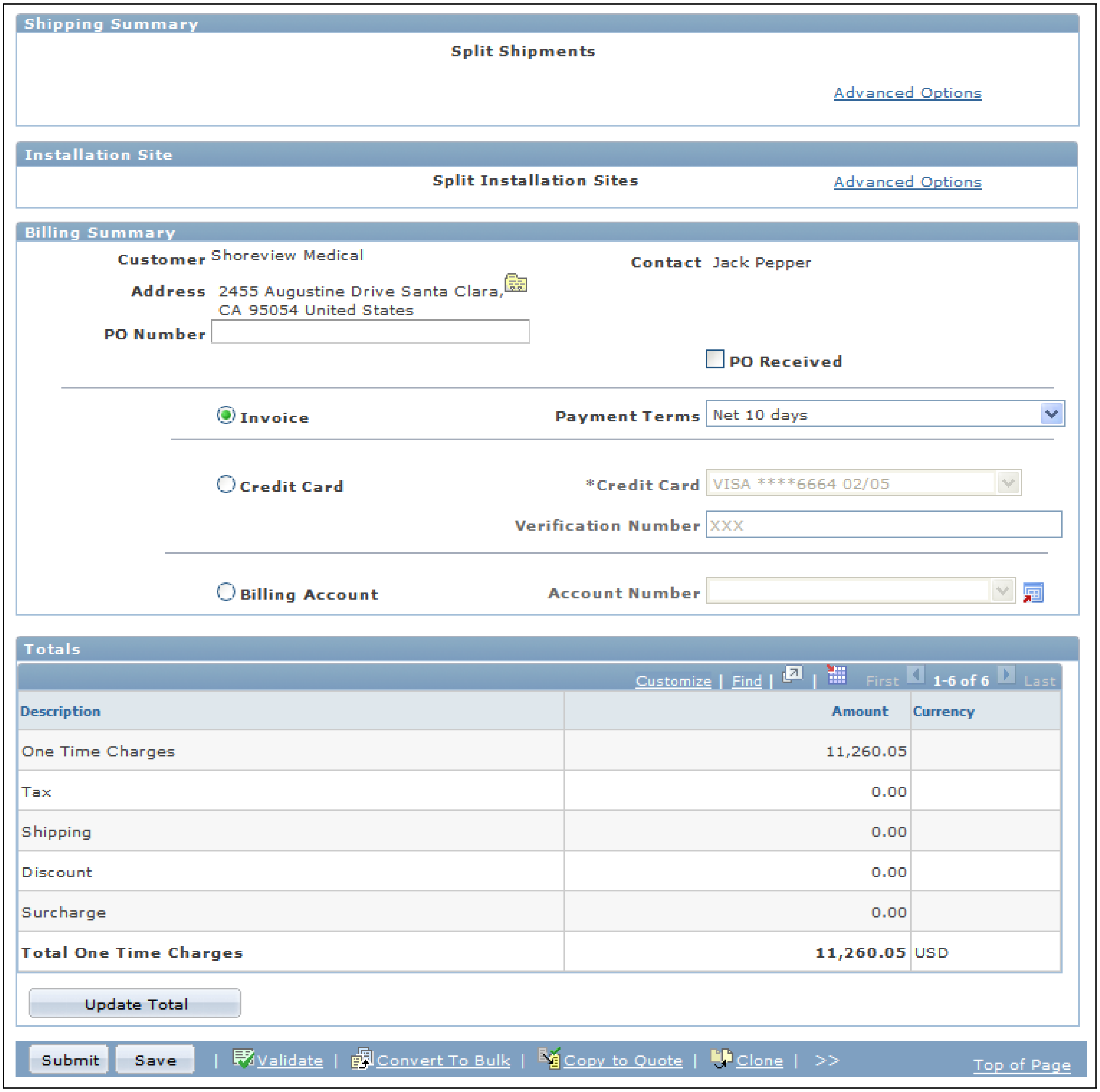
Product Entry

Add Product(s) [ ] Add Search or Browse Catalog Get Recommendations

Enter Product ID or Description - Power Add using Product,Quantity,Units;Product,Quantity,Units format

Get Product Promotions

Order — Entry Form page (2 of 3)



Order — Entry Form page (3 of 3)

Customer The customers that the partner can order for are displayed and can be selected.

Partner The name defaults based on the security of the partner logging into the system.

Customer and **Partner** Select whether to ship or bill to the customer or partner.

The partner fields can be displayed in the partner section as seen above or within the order/quote details section. Using the display template, the partner fields can be configured as appropriate for you business

Additional explanations of these fields are provided in the *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook.*

See Also

PeopleSoft CRM 9.1 Order Capture Applications PeopleBook, "Managing Orders and Quotes," Creating Orders or Quotes

Accessing Product Recommendations

Access the Product Advisor List page (click the Get Recommendations link on the Quote - Entry Form or Order - Entry Form page).

Explanations of these fields are provided in the *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook.*

See Also

PeopleSoft CRM 9.1 Order Capture Applications PeopleBook, "Managing Orders and Quotes"

Checking Availability and Pricing

Access the Check Availability and Pricing page (click the Availability tab on the Quote - Entry Form or Order - Entry Form page, then click the Check Availability link).

Explanations of these fields are provided in the *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook.*

See Also

PeopleSoft CRM 9.1 Order Capture Applications PeopleBook, "Managing Orders and Quotes"

Entering Line Details

Access the Line Details page (click the Line Details tab in the Order Details or Quote Details section on the Quote - Entry Form or Order - Entry Form page).

Configure	Click the button to launch the product PeopleSoft Sales Configurator.
Attributes	Click the button to add configurable product attributes to an order or quote line. Always specify the attribute value for products with required attributes.
Apply Adjustment	Depending on how you set up the partner, they may be restricted from applying manual adjustments.

Additional explanations of these fields are provided in the *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook.*

See Also

PeopleSoft CRM 9.1 Order Capture Applications PeopleBook, "Managing Orders and Quotes," Configuring Products

Viewing and Removing Holds

Access the Holds page (click the Holds tab in the Order Details or Quote Details section on the Quote - Entry Form or Order - Entry Form page).

Hold Displays the type of hold.

Hold Status The current status of the hold and the holds that the partner can respond to are displayed. Available options include:

Requires Action: The system defaults to this status when the hold is created.

In Progress: Used to note that some action is taking place in relation to the hold.

Override Hold: Used to pass the order to fulfillment without resolving the hold.

Resolved: Use when the hold has been fixed.

Passed: The system sets this status when the hold has been fixed.

Override Declined: The enterprise CSR can select this option to decline a hold for an order that was placed by a partner.

Pending Action By Displays the roles that can correct the hold.

See Also

PeopleSoft CRM 9.1 Order Capture Applications PeopleBook, "Managing Orders and Quotes," Managing Holds

Viewing Notes

Access the Entry Form — Notes page (click the Notes tab in the Order Details or Quote Details section on the Quote - Entry Form or Order - Entry Form page).

Explanations of these fields are provided in the *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook.*

See Also

PeopleSoft CRM 9.1 Order Capture Applications PeopleBook, "Managing Orders and Quotes," Adding and Viewing Notes and Attachments

Viewing Related Actions

Access the Entry Form — Related Actions page (click the Related Action tab in the Order Details or Quote Details section on the Quote - Entry Form or Order - Entry Form page).

Explanations of these fields are provided in the *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook.*

See Also

PeopleSoft CRM 9.1 Order Capture Applications PeopleBook, "Managing Orders and Quotes," Viewing Related Actions

Viewing Order History

Access the Entry Form — History page (click the History tab in the Order Details or Quote Details section on the Quote - Entry Form or Order - Entry Form page).

Explanations of these fields are provided in the *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook.*

See Also

PeopleSoft CRM 9.1 Order Capture Applications PeopleBook, "Managing Orders and Quotes," Viewing History

Maintaining Service Management Orders by Partners

This section provides an overview of partner service management orders and explains how a partner can:

- Add partner service management orders.
- Add service management order line details.
- View and remove holds.
- View notes.
- View related actions.
- View order history.

Partner Service Management Orders

Similar to the order entry discussed in the previous section, many of the options and pages available to the partner when entering a service order from the PeopleSoft Partner Portal are the same as when a service order is entered by a CSR The differences are listed in this section.

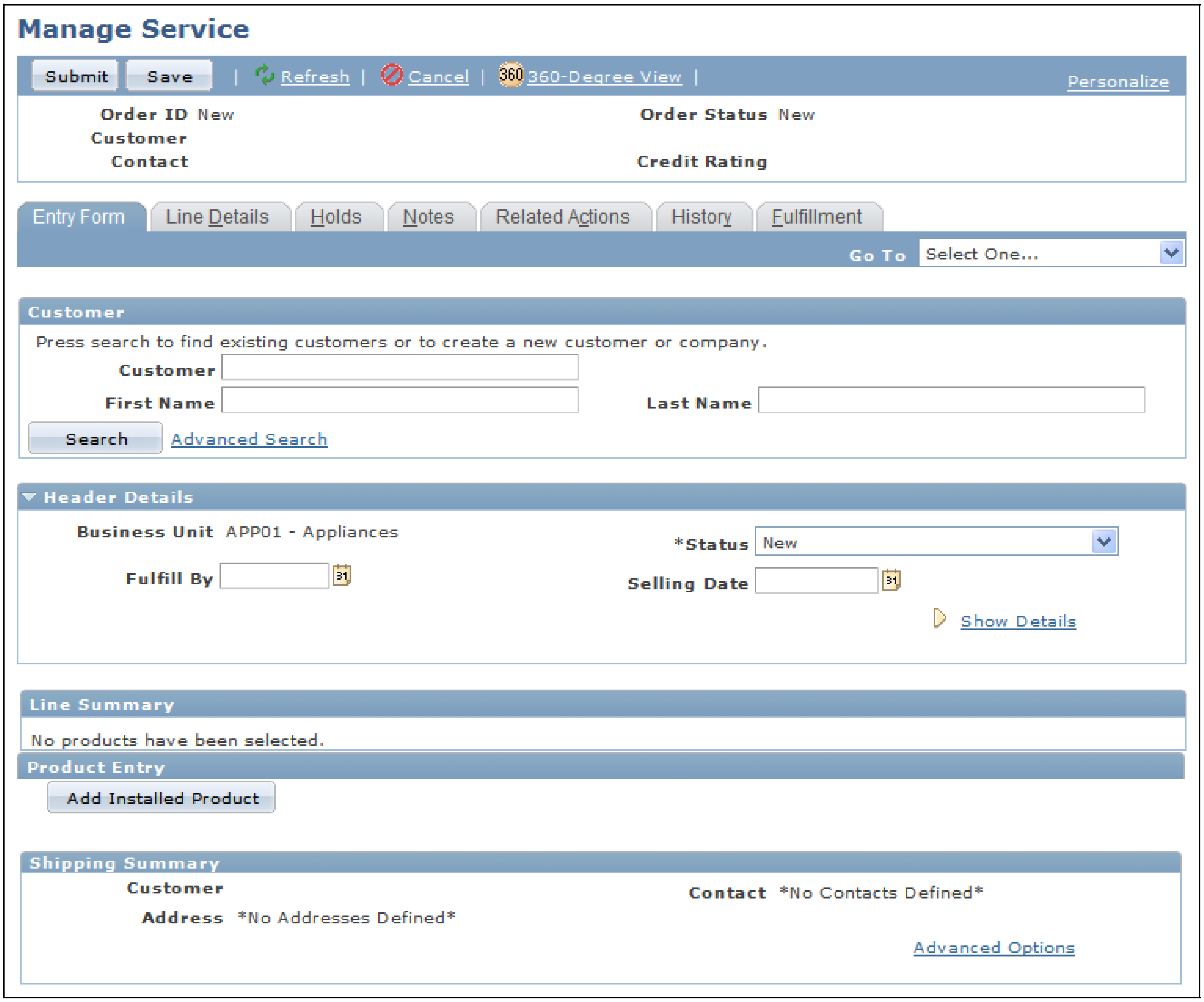
When partners log on to the PeopleSoft Partner Portal to maintain service orders, their partner and contact information is saved on the service order, but it is not displayed while they enter the order. The list of installed services that can be added to the service order are based on the partner and customer relationship.

Pages Used to Add Partner Service Management Orders

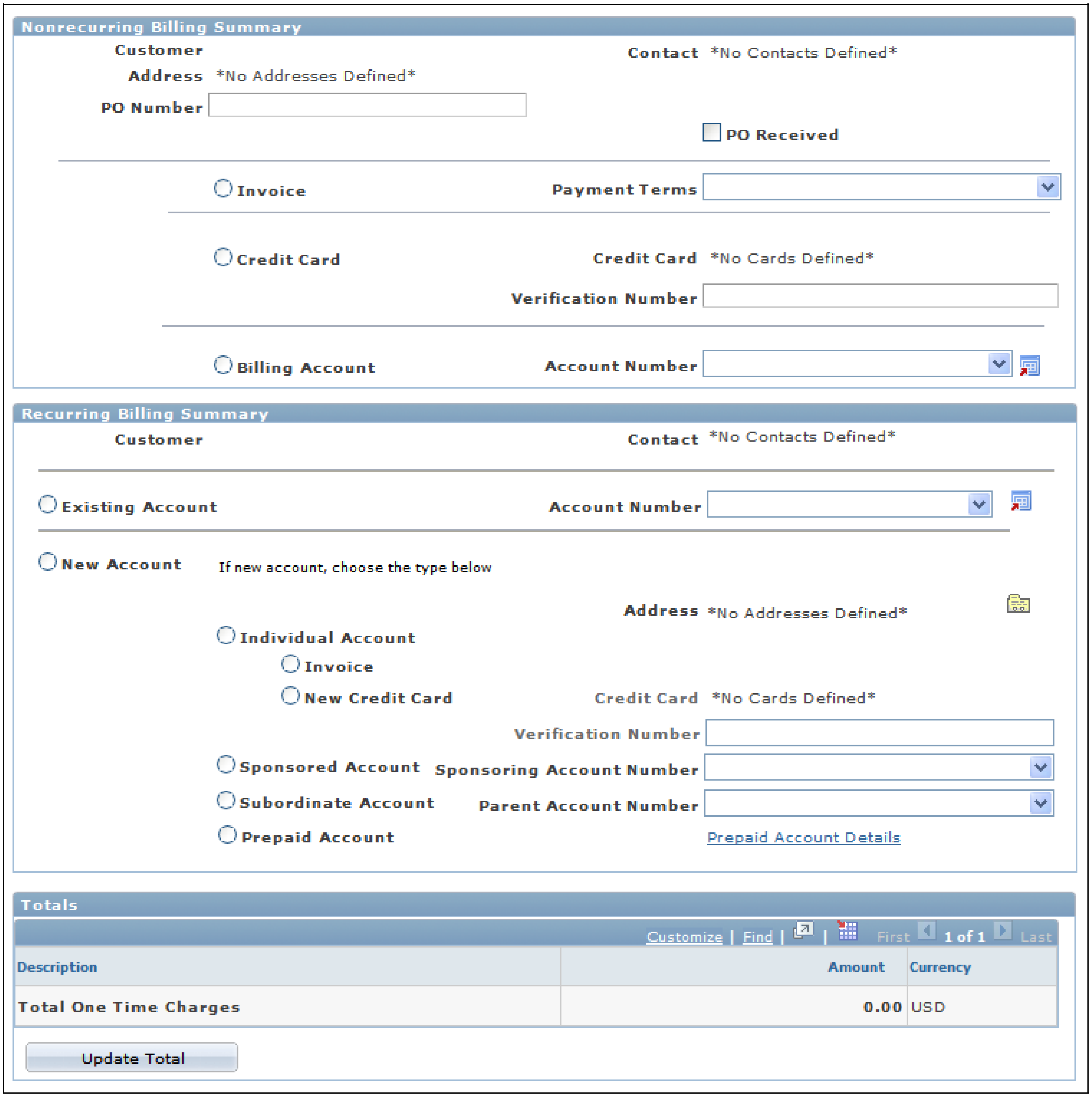
Page Name	***Definition Name***	***Navigation***	***Usage***
Search	RO_SEARCH_UPDATE	Partner Portal, Search Orders and Quotes	Search for service orders.
Manage Service — Entry Form	RO_FORM	Partner Portal, Maintain Service	Use to manage customer service requests.
Manage Service — Line Details	RO_CAPTURELINE_DTL	Click the Line Details tab in the Entry Form section of the Manage Service — Entry Form page.	Use to view line details for the order.
Entry Form — Holds	RO_HOLD	Click the Holds tab in the Entry Form section of the Manage Service — Entry Form page.	Use to view and remove holds for the order.
Notes	RO_NOTE	Click the Notes tab in the Entry Form section of the Manage Service — Entry Form page.	Use to view or add notes to the order.
Related Actions	RO_ASSOCIATION	Click the Related Action tab in the Entry Form section of the Manage Service — Entry Form page.	View related actions for the order, such as a business project that is somehow related to the order or quote.
History	RO_HISTORY	Click the History tab in the Entry Form section of the Manage Service — Entry Form page.	View changes or communication about the order.

Adding Partner Service Management Orders

Access the Manage Service — Entry Form page (Partner Portal, Maintain Service, Entry Form).



Manage Service — Entry Form page (1 of 2)



Manage Service — Entry Form page (2 of 2)

Explanations of these fields are provided in the *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook.*

See Also

PeopleSoft CRM 9.1 Order Capture Applications PeopleBook, "Working with PeopleSoft Service Management"

Adding Service Management Order Line Details

Access the Manage Service — Line Details page (click the Line Details tab in the Entry Form section of the Manage Service — Entry Form page).

Explanations of these fields are provided in the *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook.*

See Also

PeopleSoft CRM 9.1 Order Capture Applications PeopleBook, "Working with PeopleSoft Service Management," Managing Services

Viewing and Removing Holds

Access the Holds page (click the Holds tab in the Entry Form section of the Manage Service — Entry Form page).

Explanations of these fields are provided in the *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook.*

See Also

PeopleSoft CRM 9.1 Order Capture Applications PeopleBook, "Working with PeopleSoft Service Management," Managing Services

Viewing Notes

Access the Entry Form — Notes page (click the Notes tab in the Entry Form section of the Manage Service — Entry Form page).

Explanations of these fields are provided in the *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook.*

See Also

PeopleSoft CRM 9.1 Order Capture Applications PeopleBook, "Working with PeopleSoft Service Management," Managing Services

Viewing Related Actions

Access the Entry Form — Related Actions page (click the Related Actions tab in the Entry Form section of the Manage Service — Entry Form page.

Explanations of these fields are provided in the *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook.*

See Also

PeopleSoft CRM 9.1 Order Capture Applications PeopleBook, "Working with PeopleSoft Service Management," Managing Services

Viewing Order History

Access the Entry Form **—** History page (click the History tab in the Entry Form section of the Manage Service **—** Entry Form page).

Explanations of these fields are provided in the *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook.*

See Also

PeopleSoft CRM 9.1 Order Capture Applications PeopleBook, "Working with PeopleSoft Service Management," Managing Services

Viewing Financial Information

This section provides an overview of the financial account transaction, and explains how partners can view customer information regarding:

- Financial accounts.
- ATM cards.
- Terms and conditions.
- Fees.
- Claims.
- Address History.

Customer Financial Information

In the PeopleSoft Partner Portal, partners can view financial account information for the customers that they represent. The financial account information is provided to PeopleSoft customers that are in the financial industry. The partner name and company are displayed on the main page of the component.

See Also

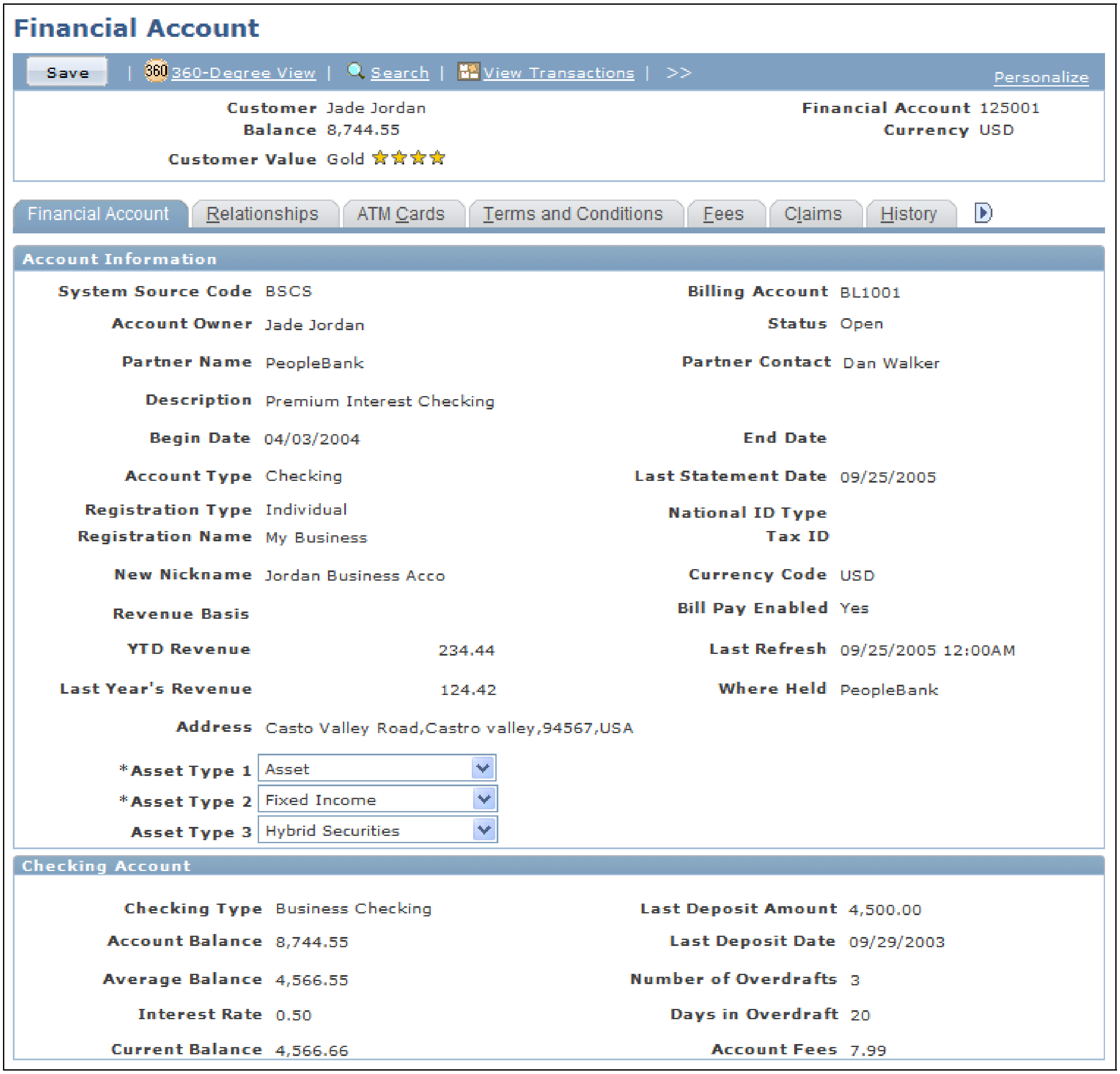
PeopleSoft Banking Transactions 9.1 PeopleBook, "Getting Started with PeopleSoft Banking Transactions"

Pages Used to View Customer Financial Information by Partners

Page Name	Definition Name	Navigation	Usage
Financial Account	RBF_FIN_ACCOUNT	Partner Portal, Review Financial Account	Use to view financial account information for customers that partners are associated with.
ATM Cards	RBF_ACCT_ATM_CARDS	Partner Portal, Review Financial Account	Use to review ATM cards.
Terms and Conditions	RBF_ACCT_ATTR	Partner Portal, Review Financial Account	Use to view the terms and conditions that are associated with the account.
Fees	RBF_FINACCT_FEES	Partner Portal, Review Financial Account	Use to view all account fees that are associated with the account.
Claims	RBF_FINACCT_CLAIMS	Partner Portal, Claims	Use to view claim information
Address History	RBF_ACTADR_HIST	Partner Portal, Review Financial Account	Use to view the address history that is associated with the account.

Viewing Financial Account Information

Access the Financial Account page (Partner Portal, Review Financial Account).



Financial Account page

The partner name and partner contact fields are displayed within the account information section. Partners can view only the customer account information that they have been secured to view. For additional field explanations reference *PeopleSoft Banking Transactions 9.1 PeopleBook.*

See Also

PeopleSoft Banking Transactions 9.1 PeopleBook, "Setting Up Internet Banking"

Viewing ATM Card Information

Access the ATM Card page (click the ATM Cards tab on the Financial Account page).

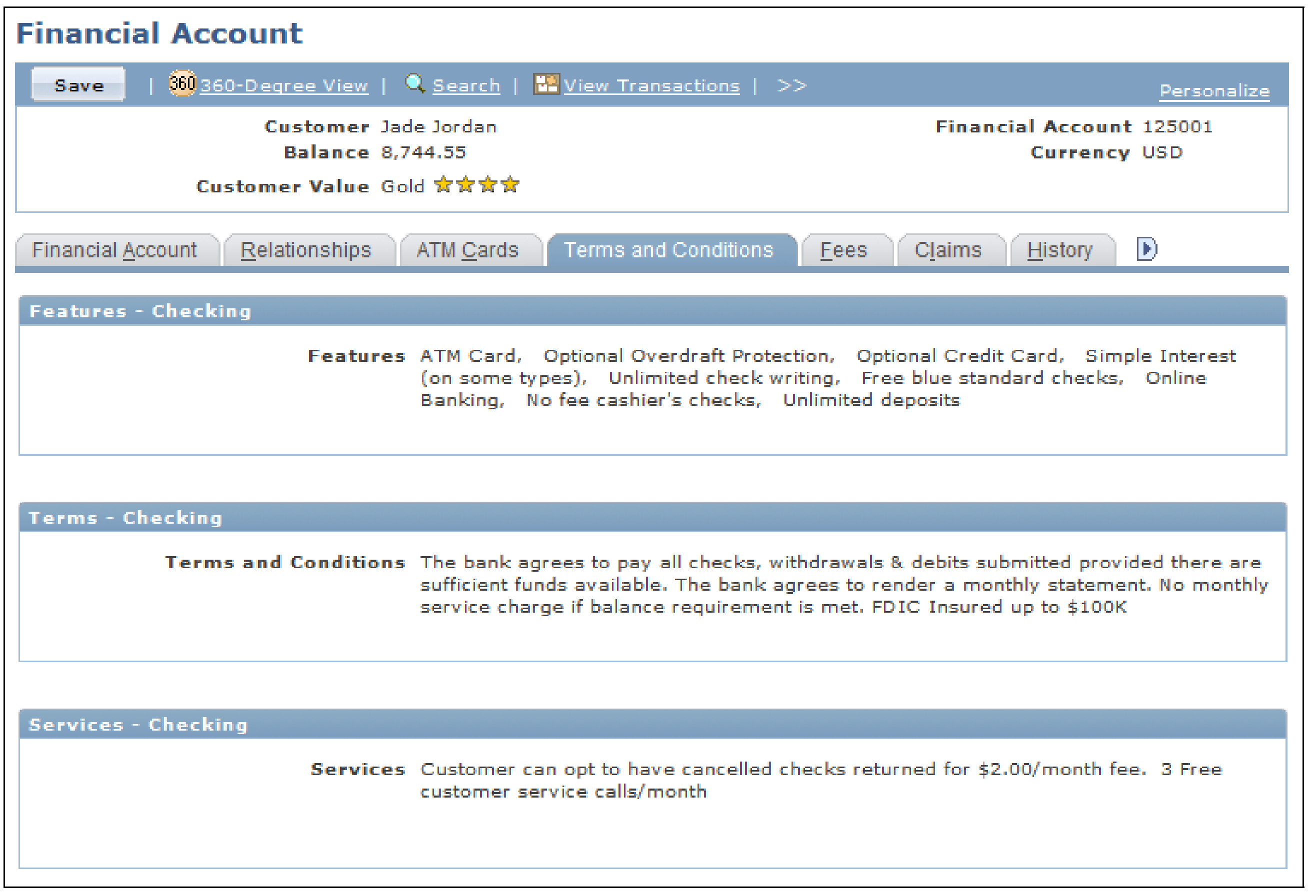
Explanations of these fields are provided in the *PeopleSoft Banking Transactions 9.1 PeopleBook.*

See Also

PeopleSoft Banking Transactions 9.1 PeopleBook, "Working with Agent Facing Banking Transactions," Managing ATM Card Details

Viewing Terms and Conditions

Access the Terms and Conditions page (click the Terms and Conditions tab on the Financial Account page).



Terms and Conditions page

Explanations of these fields are provided in the *PeopleSoft Banking Transactions 9.1 PeopleBook.*

See Also

PeopleSoft Banking Transactions 9.1 PeopleBook, "Setting Up Banking Services"

Viewing Fee Information

Access the Fee page (click the Fees tab on the Financial Account page).

Explanations of these fields are provided in the *PeopleSoft Banking Transactions 9.1 PeopleBook.*

Viewing Claims Information

Access the Claims page (click the Claims tab on the Financial Account page).

Explanations of these fields are provided in the *PeopleSoft Policy and Claims Presentment 9.1 PeopleBook.*

See Also

PeopleSoft Policy and Claims Presentment 9.1 PeopleBook, "Working with Claims," Reviewing Claims

Viewing Address History

Access the Address History page (click the Address History tab on the Financial Account page).

Explanations of these fields are provided in the *PeopleSoft Banking Transactions 9.1 PeopleBook.*

Adding Partners to Support Cases

This section provides an overview of how partners are added to cases.

Partner Cases

You can now capture partner information when logging a case either in customer self-service, or within the enterprise or employee case transaction. The partner company and partner contact can be added to the case.

You can display the partner company and partner contact in the Case Information section of the main case page or in the Partner Information section on the main case page by configuring the display template. The partner fields can be displayed in two sections of the main case page, so you should select the location that makes sense for your business needs.

When adding a case, security performs the following:

- When a partner is selected, the customer selection must be limited to those customers who are in the view list for that partner.

- When a customer is selected, the partner selection must be limited to those partners who are in the membership list that grants access to that customer.

See Also

PeopleSoft CRM 9.1 Call Center Applications PeopleBook, "Managing Cases"

PeopleSoft CRM 9.1 Call Center Applications PeopleBook, "Working with Self-Service Application Transactions"

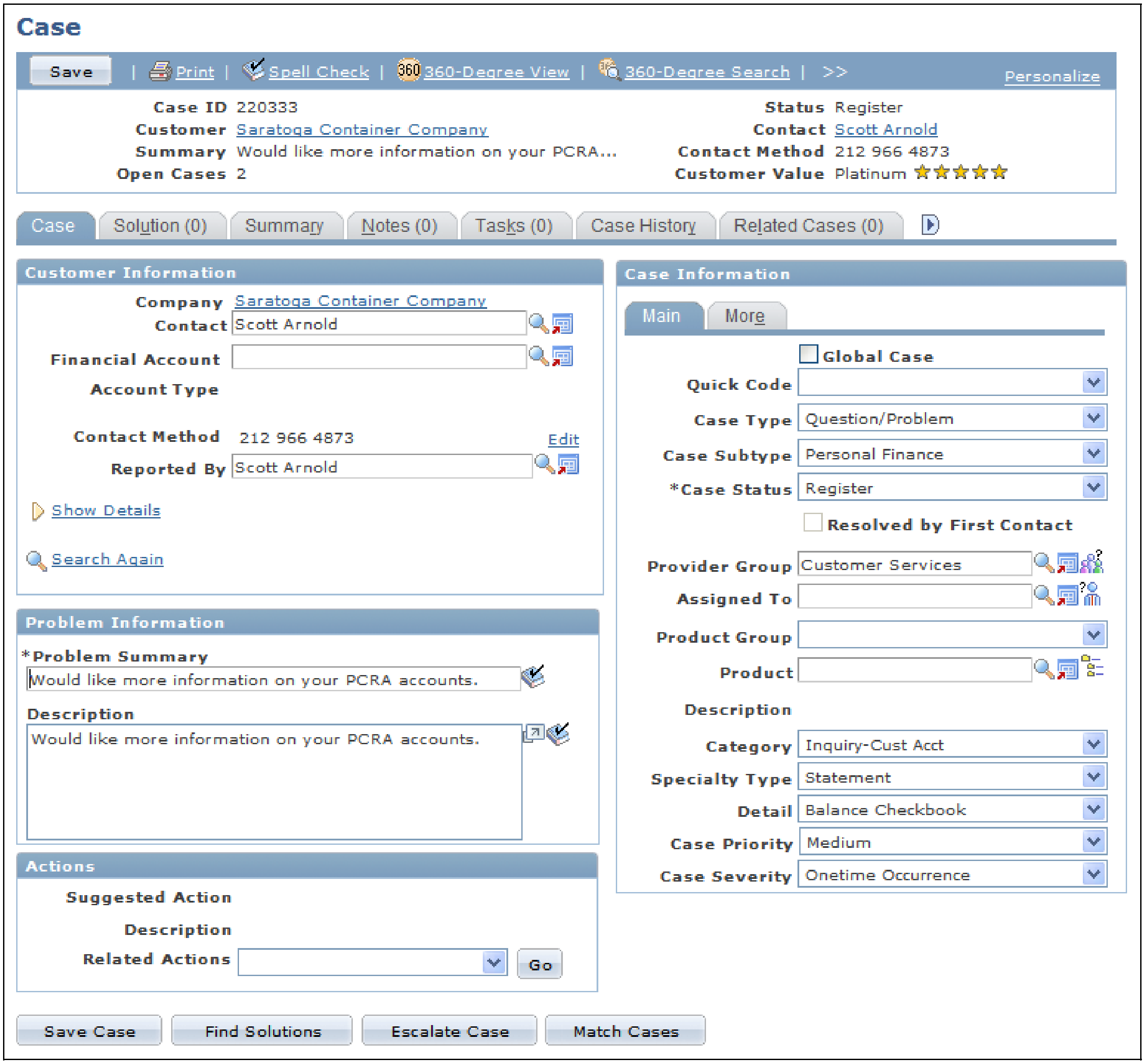
PeopleSoft CRM 9.1 Call Center Applications PeopleBook, "Defining Call Center Business Units and Display Template Options," Defining Display Template General Options for PeopleSoft Call Center

Pages Used to Add Partner Information to a Case

Page Name	***Definition Name***	***Navigation***	***Usage***
Support Case	RC_CASE	• Support, Create a Case, Case • Support, Search Cases, Case	Add and manage PeopleSoft Support cases. Use this page to perform case management tasks such as reviewing identifying information, performing toolbar functions, tracking customer information, entering problem details, verifying customer entitlements, assigning as well as resolving cases.
Create Case	RC_CASE_SW_SS_RPT	Customer Portal, Customer Care, Create Case	Use to add partner information to self-service cases.

Adding Partners to Cases

Access the Case page (Support, Create a Case, Case).



Case page

The Partner fields are in the Case Information section in this screen shot and they can also be in their own Partner Information section which is not enabled in the screen shot. The display template associated with the case can be configured to use the partner section or the case information section.

Explanations of these fields are provided in the *PeopleSoft CRM 9.1 Call Center Applications PeopleBook.*

See Also

PeopleSoft CRM 9.1 Call Center Applications PeopleBook, "Managing Cases"

Adding Partners to Self-Service Cases

Access the Create Case page (Customer Portal, Customer Care, Create Case).

Explanations of these fields are provided in the *PeopleSoft CRM 9.1 Call Center Applications PeopleBook.*

See Also

PeopleSoft CRM 9.1 Call Center Applications PeopleBook, "Working with Self-Service Application Transactions"

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