Oracle® Partner Management

Partner User Guide

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Oracle Partner Management Partner User Guide, Release 11*i*

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Preface

Intended Audience

Welcome to Release 11*i* of the *Oracle Partner Management Partner User Guide*.

This guide assumes that you have a working knowledge of the following:

- The principles and customary practices of your business area.
- The Oracle Applications graphical user interface.

  To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

How to Use This Guide

This document contains the information you need to understand and use Oracle Partner Management.

- Chapter 1 introduces the application.
- Chapter 2 provides an overview of the Partner Dashboard.
- Chapter 3 explains how to use self-service registration to sign up your organization as a partner of the vendor organization.
- Chapter 4 explains how you can maintain your personal user information and administer your company's organization as well.
- Chapter 5 describes you how can enroll your organization into partner programs, and upgrade and renew your organization's existing program memberships.
- Chapter 6 provides information about working with opportunities.
- Chapter 7 describes how to submit and manage referrals.
- Chapter 8 describes how to submit and manage deal registrations.
- Chapter 9 describes how to submit and manage special pricing requests.
- Chapter 10 describes how to request marketing funds and to manage the funds allocated to you.

See Related Documents on page x for more Oracle Applications product information.

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Structure

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2 Partner Dashboard
3 Partner Registration
4 Maintaining Partner Information
5 Enrolling into Programs
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7 Referral Management
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9 Special Pricing Management
10 Partner Funds Management

Related Documents

You can refer to Oracle iHelp for current HTML online help for Oracle Partner Management.

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Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using an Oracle Applications form can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

1

Introduction to Oracle Partner Management

This chapter covers the following topics:

- Oracle Partner Management Overview
- Oracle Partner Management Key Features

Oracle Partner Management Overview

The majority of Global 5000 businesses generate more than fifty percent of their revenue through indirect sales channels. These companies require a functionally rich and fully integrated partner management solution. Oracle Partner Management fills this need by enabling vendors to efficiently and effectively manage business with indirect channel partners, resulting in more successful and lucrative channel partnerships. Oracle Partner Management streamlines and strengthens the entire partner lifecycle, enabling companies to better recruit new partners, to more efficiently manage existing partnerships, to more effectively market to and through partners, to sell more with partners, and to measure the performance of partnerships. Oracle Partner Management is part of the Oracle E-Business Suite, an integrated set of applications that are engineered to work together.

Oracle Partner Management Key Features

The key features are:

- Partner Dashboard
- Programs and enrollment
- Opportunity management
- Referral management
- Deal registration
- Special pricing management
- Partner funds management

Partner Dashboard

The partner dashboard is your single point of entry into the vendor’s system. From the dashboard, you can:

- Enroll into partner programs.

- Manage your memberships including upgrades and renewals.
- Access stores, browse the catalog, and place orders.
- Accept and manage assigned sales opportunities, create quotes, and place orders.
- Submit referrals, register deals, request marketing funds, request special pricing, and create quotes.
- Maintain your profile and your company's profile.
- View notifications.
- Access content such as product news, training information, and FAQs.
- Distributors can view their managed partners profile information and invite new partners to join the vendor's partner programs.

The dashboard displays a summary of transactions. The list of transactions available depends on your enrollments and your role. For example, if you are authorized to resell a vendor's products, you might be assigned sales opportunities.

Programs and Enrollment

Oracle Partner Management enables you to be part of a vendor's indirect sales force by enrolling into programs designed by the vendor. Enrolling into these programs provides the utility to simplify your relationship with the vendor. Benefits that are attached to programs can provide you with new business flow functionality including submitting a referral, registering a deal, requesting partner funds, and submitting a special pricing request.

Opportunity Management

A sales opportunity is a pending sale that can be forecasted. When an opportunity is created, it is assigned to one or more sales representatives based on territory definitions. New opportunities can originate from leads or marketing campaigns, or can be entered manually. Sales representatives or channel managers can assign opportunities to you.

While routing an opportunity, vendors must be able to identify the most appropriate partner based on pre-defined rules or they can manually search for a partner based on a partner's skills and expertise.

When vendors assign an opportunity to you, you can view details and accept it. At any time, you can also abandon the opportunity.

Referral Management

Referral Management enables you to refer business opportunities that you cannot fulfill directly to the vendor's organization. For example, if one of your customers is interested in a vendor product that you do not sell, you can submit a referral to the vendor and receive a percentage of the revenue.

When you submit a request, it is routed to the appropriate approver(s). Approvers are notified of the request and they review it and approve, reassign, or decline it. When the referral is approved, you are compensated after the customer places an order. The compensation is reviewed and approved internally and then sent to you for acceptance. After you accept the compensation, the vendor pays the commission.

You can receive notifications about the referral activity and can navigate directly from the notification into the associated referral. Notifications are configured by the vendor and sent when the status changes, for example, when one of your referrals is approved.

You can access a summary list of referrals that you have access to. You can build personal views to quickly find referrals that you are most interested in.

Deal Registration

When you resell the vendor’s products, there can be a conflict with the vendor’s direct sales force on specific opportunities. Deal Registration enables you to submit opportunities and receive the vendor’s commitment not to compete directly and provide you support on the deal.

When you submit a request, it is routed to the appropriate approver(s). Approvers are notified of the request and they review, approve, reassign or decline it. When the deal registration is approved, a new opportunity is created in the system and assigned to your partner organization for fulfillment.

You can receive notifications about deal registration activity and can navigate directly from the notification into the associated deal registration. Notifications are configured by the vendor and sent when the status changes, for example, when one of your deal registrations is approved.

You can access a summary list of deal registrations that you have access to. You can build personal views to quickly find deal registrations that you are most interested in.

Special Pricing Management

Special pricing management enables you to submit and check the status of special pricing requests and claims online. A special pricing request enables you to request discounted pricing from the vendor. You can request discounts on competitive sales deals, specific end-customer deals, and on inventory that you have not been able to move.

When you submit a request, it gets routed to the appropriate approver(s). Approvers will be notified of the request and they review the request and approve or decline it. After your special pricing request has been approved, and you have closed the sale, you can submit a claim to receive the discount that was approved. The claim will be routed to the claim approver who will then validate the claim. When the claim gets approved, the vendor will pay the discount amount.

You will receive notifications about the special pricing request activity and you can link directly from the notification into the associated special pricing request. Notifications are configured by the vendor and sent when the status changes, for example, when one of your special pricing requests is approved.

You can access a summary list of all the special pricing requests that you have access to. You can build personal views to quickly find the special pricing requests that you are most interested in.

Partner Funds Management

Partner Funds Management enables you to submit and check the status of fund requests and claims online. You can request funds for specific marketing activities and thus boost sales.

When you submit a request, it gets routed to the appropriate approver(s). Approvers will be notified of the request and they review the request and approve, decline, or return the request. The approver can return the request asking you to provide additional information. After you resubmit the request and the request is approved, you can execute the marketing activity and submit a claim to redeem money from the vendor. When you submit a claim, it will be routed to the claim approver who will then validate the claim. When the claim gets approved, the vendor will pay the amount.

You will receive notifications about the fund request activity and you can link directly from the notification into the associated fund request. Notifications are configured by the vendor and sent when the status changes, for example, when one of your fund requests is approved.

You can access a summary list of all the fund requests that you have access to. You can build personal views to quickly find the fund requests that you are most interested in.

2

Partner Dashboard

This chapter covers the following topics:

- Overview
- Bins

Overview

The partner dashboard is your single entry point for all your transactions on the vendor system. From the dashboard, you can:

- Enroll into partner programs.
- Manage your memberships including upgrades and renewals.
- Manage transactions such as viewing the catalog, placing orders, managing sales opportunities, and accepting opportunities.
- Submit referrals, register deals, request marketing funds, request special pricing, and create quotes.
- Maintain partner contact and company profile information.
- View notifications.
- Access content published by the vendor.

The dashboard displays a summary of transactions and provides links that you use to navigate to the transactional system. The list of transactions available depends on your enrollments and role. For example, if you are authorized to resell a vendor's products, you might be assigned sales opportunities.

Bins

When you first log into the dashboard, you can see bins such as Quick Links bin, Renewals bin, Upgrade bin, Available Programs bin, and My Opportunities bin.

Quick Links

This bin provides links to the transactional system, such as referrals, deal registrations, opportunities, special pricing, claims, fund requests and messages.

The transactions available to you depend on the following:

- Benefits - You have to be entitled to use each type of benefit.

- User role within the partner organization - You can access transactions that you created or are assigned to you. For example, if an opportunity is assigned to you, you can see that opportunity. If you created a referral, you can view the referral. Partner administrators can access all transactions created by any user or transactions assigned to any user within their organization.

Available Programs

This bin displays new programs and programs that have incomplete enrollments. The bin is displayed only to the partner administrator. The link on the program name navigates to the program details page where the program is detailed for the administrator to evaluate. If the administrator clicks the Enroll button, she can navigate to the program's questionnaire page, and begin the enrollment process. If the vendor approves the enrollment request, the program's benefits become available for other partner users.

Renew Programs

This bin displays programs that are up for renewal. The bin is available only to partner administrators to assist them in managing their program memberships. The partner administrator can review programs and start the enrollment process by clicking the Program Name link. The renew option will appear to the user when the program is up for renewal.

Upgrade Programs

This bin displays programs that you can upgrade to. The bin is available only to partner administrators to assist them in managing their program memberships. The partner administrator can review programs and start the enrollment process by clicking the Program Name link.

My Opportunities

This bin displays all the opportunities where the routing status is Offered. You can navigate to the opportunity link to go to the Opportunity Detail page and view details of the opportunity. You must have the permission OPPTY_CONTACT to view this bin.

Welcome

This bin displays a welcome message with the user name and you can switch accounts if you have multiple accounts. You can switch between accounts before enrolling into a program or before submitting a referral to use a particular account.

3

Partner Registration

This chapter covers the following topics:

- Overview
- Self Service Registration
- Partner Member Types
- Users and Security

Overview

Partner registration enables vendors to administer and expedite your self-service registration and enrollment into programs.

Registration involves the creation of a user and company account following the collection of general data from you. User management allows you to use the self-registration process to register your company as a partner. During the registration process, you can also register yourself as the contact of your organization.

Self Service Registration

You can register yourself or your organization from the Register Here link or by using any other custom link like Register My Partner Organization provided on any page during implementation.

Once the registration process is initiated you are guided through a series of steps to submit your company and user information. Once this information is submitted and your registration is approved by the vendor, Oracle Partner Management generates a user account for you. You will be given a user name and password to log into the partner dashboard. The user who initiates the partner organization registration is always registered as a partner administrator.

A channel team will be assigned to you based on the vendor's territory setup. The channel team is a set of channel mangers who manage the partner.

- For directly managed partners, channel managers are vendor employees.
- For indirectly managed partners, channel managers are employees or vendor employees or both.

The partner administrator can also create user accounts for users belonging to the partner organization using the self-registration process. Once a partner organization is registered, the partner administrator can create additional partner administrators or partner users.

Use the following procedure to register using self-service.

Navigation

Log into Oracle iStore and select the Login icon.

Prerequisites

None.

Steps

1. Click **New User Registration**.
2. Select the Register as a partner option.
3. Click **Next**.
4. Enter organization details such as company name, address and so on.
5. Enter personal details such as name, address, user name and password and so on.
6. Select one or more Partner Types that become part of the profile.

If you are a subsidiary partner, enter the identification information of your global partner.

Once the registration is successful the confirmation is displayed and you can log into the partner dashboard using the newly created user account.

Partner Member Types

The member types available to you are:

- **Global:** You can register as a global partner. This allows you to share your partner number with your subsidiaries.
- **Subsidiary:** You can register as a subsidiary partner. Subsidiary partners can enroll in a program by providing the identifier information of their global partner.
- **Standard:** You can register as a standard partner.

If you have a global presence, you can register as a global partner and thus have a global membership. Once you are established as a global partner, subsidiary partners can enroll into programs under your global membership.

Notifications

The system will send out notifications when:

- A global partner is created.
- You apply for a subsidiary membership into a program.
- A subsidiary partner has been accepted into a program.
- Your enrollment has been rejected by a vendor or a subsidiary partner's membership has been terminated by a global partner.

Users and Security

Access to data is restricted by the user type.

Partner Users - Employees in the partner organization who can request for accounts via self-service and these requests are routed to partner administrators for approval. They can manage their profile, preferences, view a company's profile, manage objects that they have access to and can also purchase things from the store.

4

Maintaining Partner Information

This chapter covers the following topics:

- Overview
- My Profile
- Company Profile
- Administration
- Users and Security

Overview

You can maintain your personal and company profile by navigating to the My Profile global icon. The partner administrator can maintain the company profile and preferences.

My Profile

The Profile icon is displayed to all users. A partner user can access his own profile and preferences. A partner administrator can access hew own profiles and preferences, and the organization and administration section, from which she maintains the partner organization's company profile and manages other users.

Access to this page is granted through the use of permissions and roles:

Oracle Partner Management has seeded two roles:

- Partner administrator who can access the user profiles, preferences, and manage the company profile and the administration section.
- Partner users who can access the user profile, preferences and view their company profile.

In the My Profile page, you can update your personal details such as first name, last name, e-mail address, user name and password. You can also view your profile attributes in this page.

Use this procedure to update your personal information and view your profile attributes.

Navigation

Log in as a partner user and navigate to Profile icon > My Profile tab.

Prerequisites

None.

Steps:

1. Click the **Personal Information** side navigation link.

   The Personal Information page appears.

   - In the Details tab, you can make changes such as name, e-mail address, user name and password. Click **Apply** to save your changes.
   - In the Profiles tab, you can view profile attributes.

2. Click the **Contact Information** side navigation link and in the Address Book tab and then click **Create Address** to create an address. You can specify if an address is a shipping address or a billing address by selecting a value from the Address Type drop-down list. Click **Apply** to save your changes.

   - In the Email Addresses tab, click **Create Email Address** to create an email address. Enter necessary details and click **Apply** to save your changes.
   - In the Phone Book tab, click **Create Phone Number** to create a phone number. Enter necessary details and click **Apply** to save your changes.

3. Click the Preferences side navigation link to view and update your profile information. The profiles are listed one after the other and separated by commas. For example: Product Expertise: Unix Servers, Storage Area Networks.

   - In the General tab, set preferences such as the date format and email delivery language. Select the Marketing check box if you want to receive e-mails about special offers and products. Click **Apply** to save your changes.
   - In the Sales tab, update the general and opportunity attributes. Click **Apply** to save your changes.

Company Profile

In the Company Profile page, you can update the company profile.

Use this procedure to update the company information.

Navigation

Log in as a partner user and navigate to Profile icon > Company Profile tab.

Prerequisites

None.

Steps:

1. Click the Company Information side navigation link.

   The Organization Information page appears.

   - In the Detail tab, you can make changes such as organization name, Registry ID, annual revenue, year established, total employees, and a URL address. Click **Apply** to save your changes.
   - In the Profiles tab, you can update the sales and general profile attributes.

2. Click the Contact Information side navigation link and in the Address Book tab, click **Create Address** to create an address. You can specify if an address is a shipping

address or a billing address by selecting a value from the Address Type drop-down list. Click **Apply** to save your changes.

- In the Email Addresses tab, click **CreateEmail Address** to create an email address. Enter necessary details and click **Apply** to save your changes.
- In the Phone Book tab, click **Create Phone Number** to create a phone number. Enter necessary details and click **Apply** to save your changes.
- In the Telex tab, click **Create Telex Number** to create a telex number. Enter necessary details and click **Apply** to save your changes.

3. Click the Administrators side navigation link to view the names of administrators and their email addresses.
4. Click the Channel Team side navigation link to view the channel team and their details.
5. Click the Memberships side navigation link to view current memberships of the organization. The partner administrator can view their memberships, including contracts and the status of the memberships and start the renew and upgrade process from this page as well. To start the renewal or upgrade process, select the program and click **Renew** or **Upgrade** to navigate to the enrollment questionnaire.

Administration

A partner administrator can access the Administration tab. An administrator can create and manage users and assign them roles, and also create a new roles and assign permissions to the roles. For example, the partner administrator can create a new role that will enable a user to accept compensation on a referral or they can create a role to enable only people in the claims department to submit a claim.

Use this procedure to create users and contacts.

Navigation

Log in as the partner administrator and navigate to Profile icon > Administration tab.

Prerequisites

None.

Notes

- Click the Contact Management side navigation link and click **Create Contact** to create a contact and register the contact as a user.
- Click the Pending Approvals side navigation link to review approvals that are pending and approve or reject them.
- Click the Role Management side navigation link to create roles and assign permissions to the role. A partner administrator from the Oracle iStore application can give permission to users.

Users and Security

Access to partner data is restricted by user types.

- Partner Users - Employees in the partner organization who can request accounts via self-service. These requests are routed to partner administrators for approval. Partner users can manage their profile and preferences, view a company's profile, manage objects that they have access to and can also purchase things from the store.

- Partner Administrators - The primary contact of the organization, often the partner employee who originally registered the company. The administrator manages the company profile, creates other user accounts for their organization and assigns roles to users.

5

Enrolling into Programs

Enrollment Process

Oracle Partner Management enables you to be part of a vendor's indirect sales force by enrolling into programs designed by the vendor. Programs provide a basis for vendors to effectively segment and manage partner interactions. Vendors can group programs to target certain partner segments. Enrolling into these programs provides the utility to simplify your relationship with the vendor.

You can enroll into a program through the Available Programs bin or you can enroll into programs that are initiated by a distributor. Distributor initiated programs mean that a distributor has invited you to enroll into a partner program.

During the enrollment process, you can review the contract template attached to a program and accept or decline the legal terms. You can also choose to print and fax or mail a signed copy of the contract later, and continue with the enrollment process.

If you select I Agree:

- The contract is created between you and the vendor.
- The contract is created with the binding party name and the title that you entered.

If you select I Do Not Agree:

- The contract will not be created between you and the vendor.
- You will be asked whether you want to continue.
  - If you select Yes, the enrollment process is aborted and you will return to the partner dashboard. The data for the enrollment form is saved.
  - If you select No, you will be returned to the active window and asked again to Accept the legal terms.

If you select Print and Fax/Mail:

- The contract is created in the Entered status between you and the vendor.
- The contract is created without the binding party name, title, and date.

Enrolling via the Available Programs Bin

This bin displays new programs and programs that have incomplete enrollments. The bin is displayed to the partner administrator only.

You can review information you entered and submit your enrollment request. During the enrollment process, you can view the program fees (inclusive of taxes), if it is required for program memberships. The application displays calculated taxes based on your billing address.

Use this procedure to enroll into a program.

Navigation

Log in as a partner administrator and navigate to Available Programs Bin > Partner Program Details - Program Overview page.

Prerequisites

None.

Steps:

1. Click **Enroll Now**.

   The Enrollment Questionnaire page appears.

   The system retrieves relevant company, user, and current partner profile information. The system prompts user qualification questions relevant to the program selected for enrollment and pre-populates particular fields that currently have answers.

2. Enter necessary details and click **Next**.

   The Questionnaire Summary page appears.

3. Optionally, you can edit the enrollment form by clicking **Edit Enrollment Form**.

   The Contracts page appears.

4. Accept the contract and click **Next** to enter a billing address.

   This is the address where you would like to receive your bills.

5. Click **Next** to enter a payment method in the Payment Information page.

   The Program Fees window appears. You can view the program fees and choose to pay by credit card, check, purchase order, or, cash.

   Based on the type of payment methods defined by country, the appropriate payment methods will be presented to you depending on your country of origin.

6. Click **Next** to review the billing and payment information.

   The system presents a summary of the enrollment form for review.

7. Review and submit your enrollment.

Enrolling into Distributor Initiated Programs

Besides enrolling into programs from the partner dashboard, you can also enroll into programs when a distributor invites you to enroll into programs. Distributors can invite you to join programs depending on program setups. If you are managed by a distributor, programs that they have invited you to join, will appear in your bin on the dashboard.

Renewing Memberships into Programs

This bin appears on the dashboard when a program is up for renewal (default is 60 days before a membership expires). This bin displays programs for which the expiration date is approaching (within the grace period) or has already expired. A program appears in this bin when the first renewal notification (regarding membership expiration) is sent to you. The program name is hyperlinked to the Program Summary page. You can initiate the enrollment process from this page.

This bin is available only to the partner administrators to assist them manage their memberships.

Use this procedure to renew your enrollment into a program.

Navigation

Log in as a partner administrator and navigate to Renew Programs Bin > Partner Program Details - Program Overview page.

Prerequisites

You are enrolled in one of the programs and your membership is close to expiration. The system sends you a notification of the expiration. The notification includes a link to the application.

Notes

- Click **Renew**.

  A list of other enrollments that are up for renewal within the given time frame appear. You can enroll into the programs one at a time, or all at once.

- Select to renew all at once. You will be presented with questionnaires in order of expiration. You can complete questionnaires, enter contract information, enter payment information and submit. The system routes the enrollment forms to appropriate vendors for approval.

Upgrading Program Memberships

You can upgrade your membership from one program to another. The Upgrade Programs bin displays programs that are available to upgrade to. This bin is available only to partner administrators to assist them in managing their program memberships.

Use this procedure to upgrade your program memberships.

Navigation

Log in as a partner administrator and click the Upgrade Membership Bin > Partner Program Details - Program Overview page.

Prerequisites

None.

Steps:

1. Click **Upgrade**.

   The Enrollment Questionnaire page appears.

2. Enter necessary details and click **Next**.

The Questionnaire Summary page appears. At this stage you can also edit the enrollment form by clicking **Edit Enrollment Form**.

The Contracts page appears.

3. Accept the contract and click **Next** to enter a billing address.

   This is the address where you would like to receive your bills.

4. Click **Next** to enter a payment method in the Payment Information page.

   You can view the fees of a program and choose to pay by credit card, check, purchase order, or cash.

5. Click **Next** to review the billing and payment information and submit the enrollment application.

Users and Security

Access to enrollments is controlled based on user types.

- Partner Users - Employees in the partner organization who can view and update enrollment requests that they created.
- Partner Administrators - Maintain program memberships which includes renewals and upgrades.
- Vendor Approvers - Employees in the vendor organization who can approve enrollment requests. After they have performed the approval, they continue to have access to the enrollment request.

6

Opportunity Management

Overview

A sales opportunity is a pending sale that can be forecast. When an opportunity is created, it is assigned to one or more sales representatives based on territory definitions.

When you are assigned an opportunity, you can view details and accept it. After you have accepted the opportunity, you can view it completely and actively work on closing the business. You can create a quote and place an order. At any time, you can also abandon the opportunity.

Business Flow

The Lead to Opportunity to Quote flow contains the following steps:

- Lead Import and Processing
- Opportunity Routing
- Opportunity Offered
- Accept Opportunity
- Create Quote

Lead Import and Processing

A sales opportunity is also referred to as a potential sale. Vendors can create an indirect opportunity or import leads and convert them to opportunities.

Opportunity Matching and Routing

Once the opportunity is created, a vendor user can match it to the most appropriate partner. The user can choose to use automated matching to identify the best partner or partners for the opportunity, or he can perform manual matching:

- **Manual matching:** The user can match opportunities by selecting a preferred partner or perform a search using partner profile attributes to identify the best partner.
- **Automated matching:** The partner matching engine matches partners to opportunities based on rules set up by the channel administrator. With semi-automatic matching, the user is responsible for routing the opportunity to the partners that have been identified as appropriate recipients of the opportunity. With fully automated matching, no user intervention occurs.

The vendor user can decide whether to route the opportunity to one partner or multiple partners.

Channel Manager Approval

While routing an opportunity to a partner, the vendor user may be able to choose whether or not the channel manager must approve the routing assignment. Depending on an organization's business requirements, channel manager approval might always be required, might never be required, or may be optional.

The channel administrator can limit the time period a channel manager can hold a matched opportunity before it is forwarded to the assigned partner. If the channel manager does not process the opportunity, the routing status automatically changes to Offered and the opportunity is offered to the partner.

Opportunity Offered

When the opportunity is offered to you, you receive a notification to review and accept the opportunity. You can have a specified time limit and if you do not accept or decline it within the specified time frame, the opportunity is withdrawn. It can then be offered to another partner. Mail alerts are triggered to inform you and the vendors that the opportunity has been withdrawn.

Accept Opportunity

After you accept an opportunity, you can access the record and add more users to the team for that opportunity. All designated contacts in your company are given access to details, and if you are given full access, you can update the details. Additional sales people from your organization can be given access by adding them to the sales team. Your sales team can work on the opportunity, updating details when required and work on it till the status of the opportunity is Won or Lost. At the end of the process the opportunity is closed and e-mail alerts are sent again to inform the relevant parties.

If you decline the opportunity, you lose access to the record and the channel manager is notified.

Create Quote

After you accept an opportunity, you can create a quote or a proposal for the customer and publish it to the customer. You can add products to the quote and select the price list for the quote. You can now submit the quote for approval to the vendor. Once the vendor, the customer, and you agree on the quote, you can place an order from the quote.

Accepting or Declining an Opportunity

Use this procedure to accept or decline an opportunity.

Navigation

Log in as a partner user and navigate to Opportunities Quick Link > View All. The Opportunity page appears. Locate an opportunity that has been offered and then click the opportunity name to view details.

Prerequisites

The vendor or distributor must have offered an opportunity to you.

Notes

- To accept the opportunity, click **Accept**.

  The page refreshes and the information becomes editable when you accept the opportunity.

- Click **Decline** to decline the opportunity and select a reason. The opportunity will be removed from your opportunity list.

Abandoning an Opportunity

After you have accepted an opportunity, you can decide to abandon it.

Use this procedure to abandon an opportunity.

Navigation

Log in as a partner user and navigate to the opportunity to be abandoned.

Prerequisites

You must have accepted the opportunity previously.

Notes

- Click **Abandon** to abandon the opportunity.

  You lose visibility into the opportunity and the channel manager is notified. The channel manager can decide to close the opportunity or route the opportunity to another partner.

Creating Quotes and Placing Orders

Once you accept the opportunity to work on, you can create a quote or a proposal for the customer and publish it to the customer. You can add products to the quote, select a price list for the quote and submit the quote for approval to the vendor.

Navigation

Log in as a partner user and navigate to the opportunity.

Prerequisites

The opportunity must be Active.

Steps:

1. Click **Create Quote**.

   A quote is created with the customer information filled in.

2. Click **Apply**.

   If the opportunity had products defined, the products are carried over to the quote and priced using the price list defaulted when creating the quote.

3. Click the Approval side navigation link and click **Apply**.

   The status of the quote changes to Approved if approvers are not defined. If approvers are defined, it goes to the approvers and the status changes to Approved after they approve.

4. Select **Create Order** form the drop-down list and click **Go**.

An order is created. You can view the details of the order by clicking on the order number.

Users and Security

Access to opportunities are restricted by user types and permissions.

User Types

- Partner Users - Employees in the partner organization who can view and accept opportunities.
- Partner Administrators - Employees in the partner organization who can view and accept all opportunities owned by their organization.

Permissions

- A partner contact must have the PV_OPPTY_CONTACT permission to be able to accept an offered opportunity.

7

Referral Management

This chapter covers the following topics:

- Overview
- Business Flow
- Searching for a Referral
- Submitting a Referral
- Accepting Compensation
- Referral Notifications
- Referral Statuses
- Users and Security

Overview

Referral Management enables you to refer business opportunities that you cannot fulfill directly to the vendor's organization. For example, if one of your customers is interested in a product that you do not sell, you can submit a referral to the vendor and receive a percentage of the revenue.

When you submit a request, it is routed to the appropriate approver(s). Approvers are notified of the request and they review it and approve, reassign, or decline it. When the referral is approved. If you are compensated after the customer places an order. The compensation is reviewed and approved internally and then sent to you for acceptance. After you accept the compensation, the vendor pays the commission.

You can receive notifications about the referral activity and can navigate directly from the notification into the associated referral. Notifications are configured by the vendor and sent when the status changes, for example, when one of your referrals is approved.

You can access a summary list of referrals that you have access to. You can build personal views to quickly find referrals that you are most interested in.

Business Flow

The Referral to Partner Compensation flow. contains the following steps:

- A referral request is submitted
- Request is approved or declined

- Commission is calculated and payment is processed

Request Submission

If you have a lead or an opportunity that you cannot fulfill directly, you can refer it to a vendor and the vendor can further assign sales representatives to the opportunity.

Request Approval

When you submit a referral, a workflow process sends a notification to the designated approver(s).

Approvers review referrals and check for duplicate referrals and accept or decline a referral. If a duplicate exists, the approver links it with the referral submitted by you. If a duplicate does not exist, the user approves the referral after checking the quality of the data entered in the referral form.

Request Declined

If the referral is declined, you receive a notification accordingly. Depending on the setup, the approver is notified too.

Commission Calculation and Payment Processing

Once your referral is approved, it becomes a lead. If the referral generates revenues for the vendor, you are compensated based on the referral agreement. You can review compensation details and accept it or ask for assistance. The compensation rates can vary from initiative-to-initiative and depends on the product category. The referral is closed automatically by the system after you receive your compensation.

Searching for a Referral

You can perform advanced searches based on referral attributes. You can customize the search criteria by adding or removing search attributes. You can choose attributes on which you want to base your search. You can save your search criteria and use it as the default view of referrals.

While searching for a referral, you can select the view name, number of rows displayed, description and optionally set the display and sort options. In addition, you can select columns that you want to display in the search results.

Submitting a Referral

Use this procedure to create and submit a referral request for approval.

Navigation

Log on as a partner user and navigate to Referrals Quick Link > Referrals.

Prerequisites

None.

Notes:

- **Name:** Provide a referral name. The Partner name is provided automatically.

- **Partner Contact:** Select a partner contact from the contact LOV. The contact that you specify will receive notifications about the referral.
- **Customer and Contact Information:** Enter a customer organization name and select a country from the drop-down list, and then click **Go**. The list of countries available in the list is dependent upon the referral initiative you selected. If a country is not listed, click Cancel to navigate back to the Referrals page and select the appropriate initiative. The address fields change to reflect the address format valid for the country selected. Enter the address information.
- **Products region:** Enter product categories for the referral. The list of products available is determined by the referral benefit selected. The unit price of all the products selected for the referral must be greater than or equal to the threshold amount specified in the referral benefit for the matching geographic region.
- **Currency:** Select a currency for the products. The currency selected becomes the currency displayed on the lead or opportunity record once the referral request is approved.
- **Notes:** Enter notes by selecting a note type from the Note Type drop-down list. Notes entered by partner users are given the status Public, which means that it can be viewed by other partner and vendor users. You can use notes to store and maintain extra information and comments while creating the referral.
- **Save:** Saves the referral without submitting it for approval.
- **Submit:** Saves the referral and submits it to the vendor for approval.

Accepting Compensation

Use this procedure to accept compensation for a referral.

Navigation

Log in as a partner user and navigate to Partner Dashboard > Referral Quick Link.

Prerequisites

The referral must have the Awaiting Partner Acceptance status.

Notes

- Click **Assistance Request** if you do not want to accept compensation. Enter notes to further discuss the compensation with the vendor.

The person assigned to the claim is notified and can update the claim and contact you.

- Click **Accept Compensation** to accept the compensation.

Referral Notifications

You receive a notification after you submit a referral for review. You are also notified when the referral is approved or declined. Finally, you receive a notification when you need to review and accept the proposed compensation.

Referral Statuses

You can view the status of your referrals and enter notes for a referral. Besides entering notes, you cannot update a referral. You receive notifications that notify the status of the referral at various stages.

The following table provides information on different statuses.

Referral Statuses

Status	Description
APPROVED	Approved
CLOSED_DEAD_LEAD	Closed. Dead Lead
CLOSED_FEE_PAID	Closed. Fee Paid
CLOSED_LOST_OPPTY	Closed. Lost Opportunity
COMP_AWAIT_PRT_ACCEPT	Awaiting For Partner Acceptance
COMP_CANCELLED	Compensation Cancelled
COMP_INITIATED	Processing Compensation
COMP_BEING_NEGOTIATED	Negotiating Compensation
DECLINED	Declined
DRAFT	Draft
EXPIRED	Expired
MANUAL_CLOSE	Closed by Vendor
MANUAL_EXTEND	Extended by Vendor
PAYMENT_BEING_PROCESSED	Payment Being Processed
SUBMITTED_FOR_APPROVAL	Pending Approval

Users and Security

Access to referrals are restricted by roles and user types.

User Types

- Partner Users - Employees in the partner organization who can view and update referrals they have created and referrals where they are identified as the Partner Contact.
- Partner Administrators - Employees in the partner organization who can view and update all referrals owned by their organization.

Permissions

- Super User Permission - [PV_REFERRAL_SUPERUSER] - Allows a partner user to view and update all referrals owned by their organization.
- Compensation Approver - [PV_REF_COMP_APPROVER] - Enables partners to view and accept compensation for referrals.

Note that users who are granted access to all leads and opportunities within the sales application can access all referrals that generated a lead or an opportunity.

8

Deal Registration

This chapter covers the following topics:

- Overview
- Business Flow
- Searching for a Deal Registration
- Registering a Deal
- Deal Registration Notifications
- Deal Registration Statuses
- Users and Security

Overview

When you resell the vendor products, there can be a conflict with the vendor's direct sales force on specific opportunities. Deal Registration enables you to submit opportunities and receive the vendor's commitment not to compete directly and support you on the deal.

When you submit a request, it is routed to the appropriate approver(s). Approvers are notified of the request and they review, approve, reassign or decline it. When the deal registration is approved, a new opportunity is created in the system and assigned to your partner organization for fulfillment.

You can receive notifications about deal registration activity and can navigate directly from the notification into the associated deal registration. Notifications are configured by the vendor and sent when the status changes, for example, when one of your deal registrations is approved.

You can access a summary list of deal registrations that you have access to. You can build personal views to quickly find deal registrations that you are most interested in.

Business Flow

The Deal Registration to Opportunity flow contains the following steps:

- Request is submitted
- Request is approved
- An opportunity is created

Request Submission

When you have a business deal and want to fulfill it directly, you can register the deal with the vendor to avoid competition from their direct sales force.

Request Approval

When you submit a deal, the system identifies the approvers based on the deal details and notifies them. The deal has to be reviewed and approved or declined by the appropriate person.

If a duplicate deal exists, the approver selects the deal and links it with the deal submitted by you. If a duplicate deal does not exist, the approver approves the deal after viewing the details.

After the approval, the customer and contact of the deal is checked against existing customers and contacts in the system.

If the reviewer finds that the data is not good enough or there is already a duplicate, the reviewer can decline the deal and enter a comment. You receive a notification accordingly.

Opportunity Created

When the deal registration is approved, a new opportunity is created in the system and assigned to your partner organization for fulfillment. You are notified about the approval and when you fulfill the opportunity, the opportunity is closed. If you do not accept or decline the opportunity in the specified time, the vendor can re-evaluate the deal and can allot you some more time to accept or decline the opportunity.

Searching for a Deal Registration

You can perform advanced searches based on deal registration attributes. You can customize the search criteria by adding or removing search attributes. You can choose attributes on which you want to base your search. You can save your search criteria and use it as the default view of deal registrations.

While searching for a deal registration, you can select the view name, number of rows displayed, description and optionally set the display and sort options. In addition, you can select columns that you want to display in the search results.

Registering a Deal

Use this procedure to create a deal registration request and submit it to the vendor for approval.

Navigation

Log in as a partner user and navigate to Deal Registrations Quick Link > Deal Registration.

Prerequisites

None.

Notes:

- **Name:** Provide a name for the deal registration. The Partner field is populated with the name of your organization.
- **Contact:** Select the name of the partner contact from the drop-down list. The user identified as the contact for the deal registration will receive notifications about the deal registration.
- **Customer and Contact Information:** Enter a customer organization name, select a country from the drop-down list, and click **Go**. The list of countries available in the drop-down list is dependent upon the deal registration benefit selected. If a country is not listed, click Cancel to navigate back to the Deal Registration page and select the appropriate benefit. The address fields change to reflect the address format valid for the country selected. Enter the address information.
- **Products:** Select product categories for the deal registration. The list of products available is determine by the deal registration benefit selected. The unit price of all the products selected for the deal registration must be greater than or equal to the threshold amount specified on the deal registration benefit for the matching geographic region.
- **Currency:** Select a currency for the deal registration. The currency becomes the currency displayed on the opportunity once the deal registration request is approved.
- **Notes:** Enter notes by selecting a note type from the Note Type drop-down list. Notes entered by partner users are given the status Public, which means that it can be viewed by other partner and vendor users. You can use notes to store and maintain extra information and comments while creating the deal registration.
- **Save:** Saves the deal registration without submitting it for approval.
- **Submit:** Saves the deal registration and submits it to the vendor for approval.

Deal Registration Notifications

You receive a notification after you submit a deal registration for review. You are also notified when the deal registration is approved or declined.

Deal Registration Statuses

You can view the status of your deals and enter notes for a deal registration. After submitting the deal registration, you can only update the partner contact name and add notes to the deal registration. You receive notifications at various stages of the deal registration to allow you to track the status of the deal registration.

The following table provides information on different statuses.

Deal Registration Statuses

Status	Description
APPROVED	Deal is approved
CLOSED_DEAD_LEAD	Closed. Dead Lead
CLOSED_LOST_OPPTY	Closed. Lost Opportunity
CLOSED_OPPTY_WON	Closed. Opportunity Won
DECLINED	Declined
DRAFT	Draft
EXPIRED	Expired
MANUAL_CLOSE	Closed by Vendor
MANUAL_EXTEND	Extended by Vendor
SUBMITTED_FOR_APPROVAL	Pending Approval

Users and Security

Access to deal registrations are restricted by roles and permissions.

User Types

- Partner Users - Employees in the partner organization who can view and update deal registrations they have created and deal registrations where they are identified as the Partner Contact.
- Partner Administrators - Employees in the partner organization who can view and update all deal registrations owned by their organization.

Permissions

- Super User Permission - [PV_DEAL_SUPERUSER] - Partners with this permission can view and update all deal registrations for their organization.

Note that users who have access to all opportunities will also access all the deal registrations that have been converted into opportunities.

9

Special Pricing Management

This chapter covers the following topics:

- Overview
- Business Flow
- Claim Validation
- Relationships between Special Pricing Requests and Claims
- Searching for a Special Pricing Request
- Submitting a Special Pricing Request
- Submitting a Claim
- Special Pricing Request Statuses
- Claim Statuses
- Users and Security

Overview

Special Pricing Management enables you to submit and check the status of special pricing requests and claims online. A special pricing request enables you to request discounted pricing from the vendor. You can request discounts on competitive sales deals, specific end-customer deals, and on inventory that you have not been able to move.

When you submit a request, it gets routed to the appropriate approver(s). Approvers will be notified of the request and they review the request and approve or decline it. After your special pricing request has been approved, and you have closed the sale, you can submit a claim to receive the discount that was approved. The claim will be routed to the claim approver who will then validate the claim. When the claim gets approved, the vendor will pay the discount amount.

You will receive notifications about the special pricing request activity. Notifications are configured by the vendor and sent when the status changes, for example, when one of your special pricing requests is approved.

You can access a summary list of all the special pricing requests that you have access to. You can build personal views to quickly find the special pricing requests that you are most interested in.

Business Flow

The Special Pricing Request to Partner Claim flow contains the following steps:

- Special pricing request is submitted
- Request is approved or declined
- An offer is created
- A claim is submitted
- The claim is validated

Request Submission

You can submit a request by logging into the partner dashboard.

You can request for special pricing in two scenarios.

- Existing inventory - When you have already bought the product and want a discount for past purchases. When you request for a special price and the vendor approves it, you can proceed to make the sale to the end-customer and claim the discounted amount by providing the proof of sale to the vendor.
- New inventory - When you request a special price for a new purchase and the vendor approves it, you can close the sale to the end-customer at a discounted rate. When you book the order with the vendor, you can include the offer authorization information from the approved special pricing request. If the vendor approved the request as an off-invoice discount, you will immediately receive the discount. If the vendor approved the request as an accrual discount, you will receive the discount by submitting a claim. After you complete the sale, you can provide proof of your sale to the vendor and claim the discounted amount. The amount can either be accrued or given off the invoice, as determined by the vendor's organization.

You can request discounts on competitive sales deals, specific end-customer deals, and on inventory that you have not been able to move.

The following table describes the different request types and different set of data that the system captures depending on each request type.

Request Types

Request Type	Description	Differences in Data Captured
Meet Competitor Price	Used when you want to match a competitor's price. You can ask the vendor to reduce the price to complete a sale.	Both end-customer and reseller information is captured.
Bid Request	Used to request discounted pricing on a particular end-customer deal.	Only end-customer information is captured.
Blanket Request	Used when you have inventory in your warehouse and have not been able to move it. You can ask for a discount to move the unsold inventory.	Neither end-customer nor reseller information is captured since the request is not for a specific end-customer deal.

Request Approval

When you submit a request, the appropriate vendor approver will be notified. Notifications can be configured to be sent to you as soon as the request is either returned, approved or declined. When the approver is notified of a request, they review the request and either approve it or decline it.

Offer Created

Offers are generated in the background when a special pricing request is approved, to track the approved special pricing discounts.

If you submitted a special pricing request for new inventory, the vendor will have the option to select the Offer Type with which they want to approve the special pricing requests.

There are three types of offers:

- Accrual offer
- Off-invoice offer
- Scan data offer

Accrual Offer

If the special pricing request is being fulfilled from new inventory, the discounted amount can be accrued and you will be paid later. If the vendor specifies an Accrual Offer type, you have to submit a claim.

Off-Invoice Offer

If the special pricing request is being fulfilled from new inventory, the discounted amount can be paid to you off the invoice. If the vendor specifies an Off-Invoice Offer type, you do not have to submit a claim.

When you make a sale from new inventory, a unique offer number will be generated and displayed on the approved special pricing request. When requests are approved with off-invoice offers or accrual offers, this offer number can be used while placing orders.

Scan Data Offer

If the special pricing request is being fulfilled from existing inventory, the system will generate a Scan Data offer.

When you make a sale from existing inventory, the offer number is the same as the agreement number displayed in the user interface. If a scan data offer type is used, you have to submit a claim.

Declined Requests

A vendor approver can decline a request. When doing so, they can add a reason and comment that you see as a Note in the request. A vendor might decline a request because information was missing. In this case, you can add the missing information as a note or an attachment and resubmit the request. It will continue through the standard approval process.

Claim Submission

When a request is approved, the vendor has committed to the discounted price for the products, quantity and time frame listed on the request. After you complete a sale at the discounted price, you can submit a claim to collect your payment. The claim gets linked to the request.

You can submit claims manually, or you can submit Point of Sales (POS) data to the vendor in order for them to upload into the system and automatically generate special pricing claims. You can track the status of a claim by logging on to the partner dashboard to check the claim status.

You can submit claims from dashboard electronically as Point of Sale (POS) data. POS data can either be submitted in EDI supported standards as xml files or as an excel sheet that vendors can upload. Vendor can determine what needs to be sent as POS data. POS data can contain Claim Number, Claim Amount, Agreement Numbers, Order Numbers, End Customer, Product and Pricing Information. Claim requests sent as POS data gets linked back to the special pricing request after a claim is generated.

You can send POS data to the vendor on a periodic basis. They can use the information in the POS data feed to validate the sale and automatically create a claim and generate payment.

For information on submitting special pricing claims information within a POS file , see the *Oracle Partner Management Vendor User Guide*.

Claim Validation

When you submit a claim, the status of the claim is 'Open'. If it is a valid claim, the approver approves the claim. If the claim is not valid, the approver declines the claim. You can see claim statuses when you log into the system. You can link into the claim, add notes, and add attachments. After the approver approves the claim, the system initiates payment.

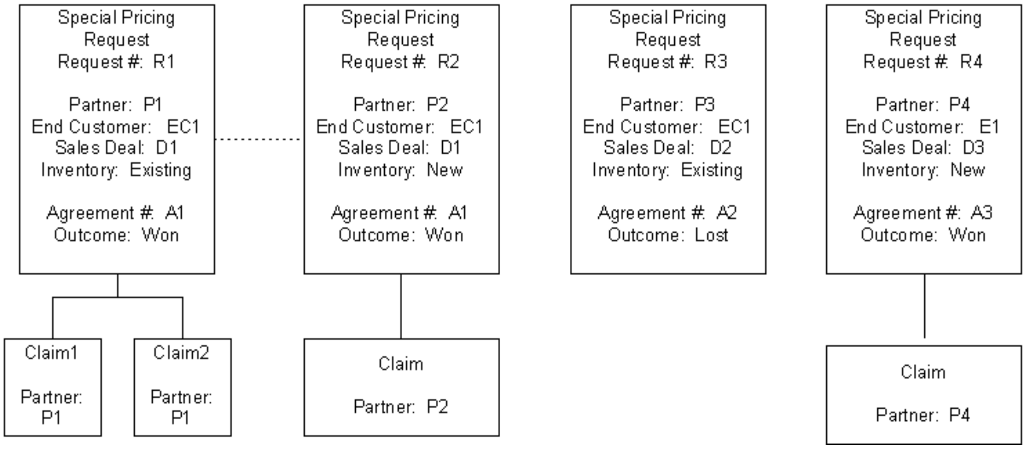
Relationships between Special Pricing Requests and Claims

To collect payment on the approved special pricing discount, you can submit a claim.

The diagram below explains a scenario of submitting a request and the outcome of submitting a request.

A partner P1 submits a special pricing request R1 to close a sales deal for a specific end-customer EC1. When the request is approved, the partner makes the sale from the existing inventory and the outcome of the sale is Won. After the request is approved, the Agreement number A1 will be generated and it appears in the user interface. You can submit multiple claims for a request. During approval, if requests are linked, the same Agreement number A1 will be used for requests that are linked to each other.

Relationship Between Special Pricing Requests and Claims


Special Pricing Request
Request #: R1
Partner: P1
End Customer: EC1
Sales Deal: D1
Inventory: Existing
Agreement #: A1
Outcome: Won
Special Pricing Request
Request #: R2
Partner: P2
End Customer: EC1
Sales Deal: D1
Inventory: New
Agreement #: A1
Outcome: Won
Special Pricing Request
Request #: R3
Partner: P3
End Customer: EC1
Sales Deal: D2
Inventory: Existing
Agreement #: A2
Outcome: Lost
Special Pricing Request
Request #: R4
Partner: P4
End Customer: E1
Sales Deal: D3
Inventory: New
Agreement #: A3
Outcome: Won
Claim1
Partner: P1
Claim2
Partner: P1
Claim
Partner: P2
Claim
Partner: P4

You can view requests and claims for your organization only.

Searching for a Special Pricing Request

You can search for special pricing requests to view request details or submit a claim.

You can perform advanced searches based on request attributes. You can customize the search criteria by adding or removing search attributes. You can choose attributes on which you want to base your search. You can save your search criteria and use it as the default view of special pricing requests.

While creating a personalized view to search for requests, you can select the view name, number of rows displayed, description and optionally set the display and sort options. In addition, you can select columns that you want displayed in the search results.

Submitting a Special Pricing Request

Use this procedure to create a special pricing request and submit it to the vendor for approval.

Navigation

Log in as a partner user and navigate to Special Pricing Requests Quick Link > Special Pricing Requests.

Prerequisites

None.

Notes:

- **Distributor:** This is the name of your organization, and is populated automatically

  Requestor Information: The name of and information for the user creating the special pricing request is populated automatically. You can change the requestor information to that of another partner user, if necessary.

  Request Type: Select the special pricing request type from the drop-down list. The request types are Meet Competitor Price, Bid Request, and Blanket Request.

- **Ship from Stock:** Select if you are going to fulfill the special pricing deal with products from existing inventory.
- **Outcome:** Indicates the status of the sales deal. You can update this information regularly to track whether the request has been won or lost, or is still in progress.
- **Continue:** Click to provide additional information about the special pricing request, including Products, Notes, and Attachments. In addition, if the Request Type is Bid Request, the End-Customer Details region appears. If the Request Type is Meet Competitor Price, both the Resellers and the End-Customer Details regions appear.
- **Products:** In the Products region, enter details about the product(s) for which you want a discount. Select a product, specify the quantity, unit of measure, the regular price of the product, the discount amount, and the discount type. The discount types are Discount Percentage, Discount Amount, and New Price.
- **Save:** Saves the request without submitting it for approval.
- **Submit:** Saves the request and submits it to the vendor for approval.

Submitting a Claim

You can submit a claim for an approved special pricing request once the related deal has been won and the inventory shipped to the customer.

You do not need to create a claim for a special pricing request that generated an off-invoice offer since the discount has already been taken off the invoice directly.

Navigation

Log in as a partner user and navigate to Special Pricing Requests Quick Link >Special Pricing Requests page. Then, locate the request for which you want to submit a claim and click **Submit Claim**.

Prerequisites

The special pricing request must be Approved.

Notes:

- **Special Pricing Summary region:** The Special Pricing Request Summary region displays a summary of the request. You can view the total amount approved, the amount that has been claimed, the amount that has been paid out, and the outstanding balance. From the claim, you can link directly to the associated request. While viewing the request, you can view a summary list of all claims submitted for that request and link to them.
- **Pay to:** This field is populated automatically with the name of the partner organization. You can select a different name from the list if necessary.
- **Claim Type:** Displays the claim type used for the special pricing request. Usually, this is the default claim type.
- **Recalculate:** Click to calculate the claim amount. The claim amount is calculated based on the discount amount and quantity entered.
- **Save:** Saves the claim without submitting to for approval.
- **Submit:** Saves the claim and submits it to the vendor for approval.
- **Confirm:** Confirms the submission.

Special Pricing Request Statuses

The following table provides information on different special pricing request statuses. The application supports sending notifications indicating the status of requests such as submission of a request, approval of a request and so on.

Special Pricing Request Statuses

Status	Description
Draft	The special pricing request has been created but has not yet been submitted.
Pending Approval	The special pricing request has been submitted and is awaiting approval.
Approved	The special pricing request has been approved.
Declined	The special pricing request has been declined.
Closed	The date is greater than the waiting period specified in the Grace Period system profile. The Grace Period profile controls the duration within which users have to submit claims for a particular special pricing request after it's end date. Once the grace period is over, the status of the special pricing request changes to 'Closed' and users cannot submit claims for that particular request.

Claim Statuses

The following table describes the various statuses that a claim will go through.

Claim Statuses

Claim Status	Description
New	The claim has been submitted.
Open	The claimed amount has not yet been paid to you.
Complete	The claim has been validated by the claims analyst.
Pending Approval	The claim is pending approval from the claims approver.
Approved	The claim approver approves the claim.
Pending Close	The claim is pending settlement.
Duplicate	The claim approver finds that a similar claim has been submitted for a request.
Rejected	If the claim information submitted does not match the original request, the claim approver can decline the claim.
Closed	The claimed amount has been paid out to you.

Users and Security

Access to requests are restricted by permissions and user types.

User Types

- Partner Users - Employees in the partner organization who can view and update special pricing requests that they created and special pricing requests where they are identified as the Requestor.
- Partner Administrators - Employees in the partner organization who can view and update all special pricing requests owned by their organization.

Permissions

- Super User Permission - ['OZF_SPECIAL_PRICING_SUPERUSER'] - Allows a partner user to view and update all special pricing requests owned by their organization.

10

Partner Funds Management

This chapter covers the following topics:

- Overview
- Business Flow
- Searching for a Fund Request
- Submitting a Fund Request
- Submitting a Claim
- Fund Request Statuses
- Claim Statuses
- Users and Security

Overview

Partner Funds Management enables you to submit and check the status of the fund requests and claims online. You can request funds for specific marketing activities and thus boost sales.

When you submit a request, it gets routed to the appropriate approver(s). Approvers will be notified of the request and they review the request and approve, decline, or return the request. The approver can return the request asking you to provide additional information. After you resubmit the request and the request is approved, you can execute the marketing activity and submit a claim to redeem money from the vendor. When you submit a claim, it is routed to the claim approver who will then validate the claim. When the claim gets approved, the vendor will pay the amount.

You will receive notifications about the fund request activity and you can link directly from the notification into the associated fund request. Notifications are configured by the vendor and sent when the status changes, for example, when one of your fund requests is approved.

You can access a summary list of all the fund requests that you have access to. You can build personal views to quickly find the fund requests that you are most interested in.

Business Flow

The Fund Request to Partner Claim flow contains the following steps:

- Partner fund request is submitted

- Request is approved or declined
- A claim is submitted
- The claim is validated

Request Submission

Vendors set up program benefits, thus enabling you to enroll into programs to request channel marketing funds. To help understand the performance of your marketing activities, the system enables you to input your expected performance when submitting a fund request and your actual performance when submitting a claim for that fund request. For example, you may expect to generate 100 qualified leads with a particular mass mailing activity and then when you submit a claim for that activity, you would specify how many leads you actually generated.

You can select the marketing activity for which you want to receive funding and this drives the items that will appear in the Expense Breakdown region. You must fill in the requested amount down to the expense breakdown level. You can also capture the expected performance objective which is the outcome that is expected for an activity. For example, leads generated or revenue expected. The actual amount will be captured during the claim submission.

When you request for funds to execute marketing activities, the approver will review the fund request and approve, decline, or return the fund request.

Request Approval

When you apply for funds to execute marketing activities, the approver reviews the request and approves, returns or declines the request.

Approved Request

When a request is submitted, it is routed to the appropriate vendor approver. Notifications can be configured to be sent to you as soon as the request is either approved, declined or returned. When the approver is notified of a request, they review the request and either approve it or decline it.

Returned Request

If the approver requires additional information to be able to approve the request, they can return the request and ask you to provide additional information. For example, a vendor may perform an initial review of an incoming fund request and determine that he/she needs to review the collateral for the marketing activity before making a final approval decision. In this case the vendor approver would return the fund request to you and use the 'Collateral Requested' return reason. The approver can also add notes.

You can either attach the collateral to the fund request using the attachments functionality or send the collateral to the vendor outside the system and resubmit the fund request with a note explaining that the collateral has been submitted. Regardless of whether the request is being submitted for the first time or resubmitted with collateral attached or missing information filled in, the request is routed to the approver and will go through the approval process.

Request is Declined

The vendor may decline an incoming request. The reason for declining the request will be tracked in the Decline Reason field. Additional details about the decision to decline the request will be included as a comment viewable as a note in the fund request.

Claim Submission

After your request is approved and you have executed the planned marketing activity, you can submit a claim to redeem money from the vendor. You can submit multiple claims per request and you will see a summary of the fund request when submitting a claim. This will help you understand what has been claimed so far and the amount that is outstanding.

You can specify the actual amount that has been spent on the activity and the amount that has been claimed for the activity. You can submit a claim by providing any proof of sale that the vendor requires. You can upload the proof of performance or send it through mail or fax.

You can access the status of the claim through your dashboard. The system also captures expected performance on the fund request and the actual performance on the claim which helps you analyze the success of the marketing expenditures.

Claim Validation

When you submit a claim, the status of the claim is 'Open'. If it is a valid claim, the approver approves the claim. If the claim is not valid, the approver declines the claim. You can see the claim statuses when you log into the system. You can link into the claim, add notes, and add attachments. After the approver approves the claim, the system initiates payment.

Searching for a Fund Request

You can search for fund requests to view fund request details or submit a claim.

You can perform advanced searches based on request attributes. You can customize the criteria by adding or removing search attributes. You can save your search criteria and use it as the default view for fund requests.

While searching for a request, you can select the view name, number of rows displayed, description and optionally set the display and sort options. In addition, you can select columns that you want to display in the search results.

Submitting a Fund Request

Use this procedure to create a marketing fund request and submit it to the vendor for approval.

Navigation

Log in as a partner user and navigate to Fund Requests Quick Link > Create Funds.

Prerequisites

None.

Steps:

1. Provide the following information at the Create Fund: Definition page:
   - **Partner and requestor:** The Requestor becomes the partner contact for the request, and will receive notifications related to the request.
   - **Benefit:** Select the benefit used for the request. The benefits that are available for a partner are determined by the partner's program memberships. If a default benefit has been set up, it is available as well.
   - **Activity:** Select a marketing activity for which funding is being requested, and then enter a name and description of the activity in the Request Name and Description fields.
   - **Amount requested:** The requested amount is the amount being requested from the vendor to fund the marketing activity. The requested amount will be broken out to the expense level within the Expense Breakdown section.
   - **Partner Contribution:** A partner's contribution is how much the partner's company will contribute towards the marketing activity.
2. Click **Continue** and provide the following additional information:
   - **Expense Breakdown**: This is the breakdown of expenses for the marketing activity. The Total Amount is the amount requested plus the partner's contribution, for example, you may only fund 50% of the total amount. The line items appearing within the Expense Breakdown are based on the Activity you selected.

     Enter the requested amount at the expense breakdown level and the total amount, which includes the partner contribution, for each expense item.

     For example, if a partner has requested $1000 and plans to contribute $200, the Total amount of the fund request is $1200. In the Expense Breakdown region, if the activity is Advertising, you can break down the funding request, and request $600 for banners and $400 for posters.
   - **Performance Objectives:** This is the outcome that is expected after executing the marketing activity. This information will enable you to measure the effectiveness of marketing expenditures by tracking expected performance on the requests and actual performance on the claim.
   - **Products:** These products are the products or product categories that will be promoted by the marketing activity.
   - **Geography:** Enter the geographical regions where the marketing activity will be executed.
3. Click **Confirm** to submit the request.

Submitting a Claim

After the approval of the fund request, you can execute the marketing activity and submit a claim to redeem money from the vendor. The claims approver verifies the claim information and approves or declines the claim.

Use this procedure to submit a claim.

Navigation

Log in as a partner user and navigate to Fund Requests Quick Link > Fund Request page, and then click Submit Claim for the request for the appropriate request.

Prerequisites

A fund request must be in the Approved status for the Submit Claim button to be enabled.

Notes

- When you click Create Request, the Create Claim page appears with the following information populated automatically:
  - **Pay To:** Your organization name appears in this field.
  - **Claim Type:** Fund Request appears in the field
  - **Status**: The status of the request appears in the field.
  - **Claim Number:** The claim is numbered automatically.
- **Payment Type:** Select either credit memo or check.
- **Expense Breakdown region:** This is the breakdown of expenses for the marketing activity. The Total amount is the total amount you have requested for the marketing activity. This value should match the Total amount of the fund request. The Requested Amount is the amount requested for each activity. The Available Amount displays the amount that has not yet been claimed for each expense item. You can enter the Claim Amount for each expense item.
- **Performance Objectives region:** These are the actual results for the marketing activity. This information is used by the vendor or evaluate the effectiveness of marketing expenditures by tracking your original, expected performance and the actual performance.

Fund Request Statuses

The following table provides information on different fund request statuses. The application supports sending notifications about partner funds activity enabling the user to get e-mails. For example, when a fund request is returned to you or approved.

Fund Request Statuses

Status	Description
Draft	The fund request has been created but has not yet been submitted.
Pending Approval	The fund request has been submitted and is awaiting approval.
Returned	The fund request has been returned by the approver asking for additional information.
Approved	The fund request has been approved.
Declined	The fund request has been declined.
Void	The fund request has been made void by a vendor superuser in the vendor organization.
Closed	The fund request is closed. The Grace Period profile controls the duration within which users have to submit claims for a particular fund request after it's approved date. Once the grace period is over, the status of the fund request changes to 'Closed' and users cannot submit claims for that particular request.

Claim Statuses

The following table describes claim statuses.

Claim Statuses

Claim Status	Description
New	The claim has been submitted.
Open	The claimed amount has not yet been paid to you.
Complete	The claim has been validated by the claims analyst.
Pending Approval	The claim is pending approval from the claims approver.
Approved	The claim approver approves the claim.
Pending Close	The claim is pending settlement.
Duplicate	The claim approver finds that a similar claim has been submitted for a request.
Rejected	If the claim information submitted does not match the original request, the claim approver can decline the claim.
Closed	The claimed amount has been paid out to you.

Users and Security

Access to requests are restricted by permissions and user types.

User Types

- Partner Users - Employees in the partner organization who can view and update fund requests that they created and fund requests where they are identified as the Requestor.
- Partner Administrators - Employees in the partner organization who can view and update all fund requests owned by their organization.

Permissions

Super User Permission - ['OZF_FUND_REQUEST_SUPERUSER'] - Allows a partner user to view and update all fund requests owned by their organization.

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