

# Oracle Partner Management



Oracle® Partner Management provides the tools and information required to manage the indirect channel. Oracle Partner Management is a key component of the Oracle Customer Relationship Management solution, an integrated suite that drives profitable customer interactions.

## KEY FEATURES

- Integration with Oracle Sales for opportunity creation and management
- Streamlined approval flows for program registration, deal registration, and referrals using approval groups and role-based approval rules
- Localized partner-facing contracts
- Geography-based contract response options
- Personalizable Key Performance Indicators and shortcuts on Channel Manager Dashboard
- Multiple partner program enrollment payment options
- Support for Multi-Org Access Control (MOAC) and Single-Sign On
- Credit card security, including statement address and CVV2 code validation

## Better Channel Performance At Lower Cost

Many of the Global 5000 businesses generate more than 50 percent of their revenue through indirect sales channels. But managing partner relationships is complex and expensive, and partner performance is often hard to measure. Oracle Partner Management efficiently manages the entire partner lifecycle—from recruiting and managing partners through marketing, channel sales and performance measurement. Oracle Partner Management gives you the tools and processes you need to align sales efforts across channels, reduce partner management costs, and monitor and improve channel performance

## Align Sales Efforts Across Channels

Partner Management's robust sell-side business process flows ensure that your sales channels complement, not conflict.

## Opportunity Management Distributes Opportunities To The Best-Fit Partner

Distributing incoming opportunities to the right partner improves both channel performance and your end-customer's experience. Partner Management's rule-based opportunity distribution applies your business logic to route each incoming opportunity to the best-fit partner. A self-service web portal lets partners access new opportunities and updates them online as they work the deals. Partners can generate a quote or place an order online from within the opportunity. Advanced routing capability provides multiple ways to drive new business—from letting partners pull opportunities on a first-come-first-serve basis to routing a complex opportunity to several partners who can jointly work the deal.

## Referral Management Drives Payment-Based Referral Programs

Referral commission programs extend your market reach by rewarding partners for the business they send you. Oracle Partner Management makes these programs easy for both you and your partners. Once partners submit referrals online, a complete workflow manages the process through to commission payment. Approval steps and integrated decision support weed out duplicate referrals. The referral calculation engine automatically monitors incoming orders to determine commissions. Partners can check status, receive notifications, and accept commission amounts online, thus reducing administrative burden and payment discrepancies.

## Deal Registration Reduces Channel Conflict

Deal Registration provides clear deal ownership for partners and better pipeline visibility for you. Oracle Partner Management lets partners submit deal registrations and track their status online. Workflow-driven approvals and notifications streamline the process from submission to closure. Integrated decision support helps approvers make educated decisions and align sales efforts across multiple partners and channels.

## Reduce Partner Management Costs

Oracle Partner Management gives you better control of both the money you pay to partners, and the money you spend administering them.

## Online Portal Makes Routine Interactions Self-Service

Oracle Partner Management's online partner dashboard gives partners the information and tools they need without consuming your staff resources. Partners can access and accept opportunities, submit and track transactions, buy products and receive support—all through one convenient web interface. You can configure dashboard alerts to notify partners about newly assigned opportunities, program renewals and upgrades. With self-service administration, managers at partner companies can approve and manage users within their own organization, further reducing your administrative costs.

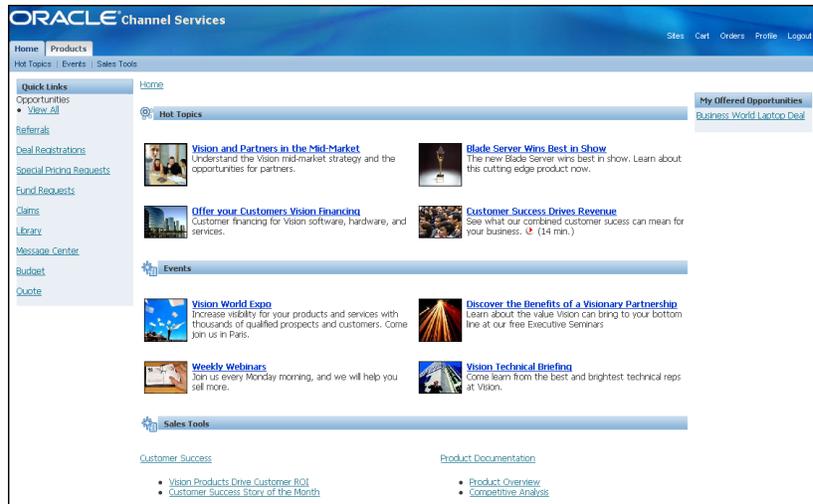


Figure 1. The Partner Dashboard

## Partner Funds Management Better Allocates Marketing Funds

Oracle Partner Management provides a complete online process for allocating channel funds and measuring their impact. Online submission and a complete approvals workflow streamline the process. Funds Management links the liabilities from claims to the General Ledger to ensure proper accounting. Managers can analyze the effectiveness of programs by capturing expected performance on the incoming fund request and actual performance during claim submission.

## Special Pricing Management Efficiently Handles Deal-Based Exceptions

Oracle Partner Management helps you respond more quickly and intelligently to discount requests. Partners can submit and track their special pricing requests online. The special pricing workflow efficiently manages approvals and legal compliance checks—including the Robinson-Patman act. Additionally, the system supports the option to let partners fulfill special pricing deals from inventory they have already purchased and submit a claim for the discount amount. Valid claims can be paid via check or credit memo through your financial systems.

## Monitor and Improve Channel Performance

Oracle Partner Management enables you to continuously gauge the effectiveness of partnerships.

## Pre-Built Channel Metrics Measure Partner Performance

Oracle Partner Management provides a variety of pre-built channel metrics, including opportunity close rate, sales year to date, and open claims. Users can personalize the channel manager dashboard to display only the metrics that are pertinent to their channel. From the dashboard, users can drill down into a specific partner's profile to view individual performance, trends, and transactions. An extensible framework enables you to configure your own additional performance metrics using information from other Oracle or third-party applications.

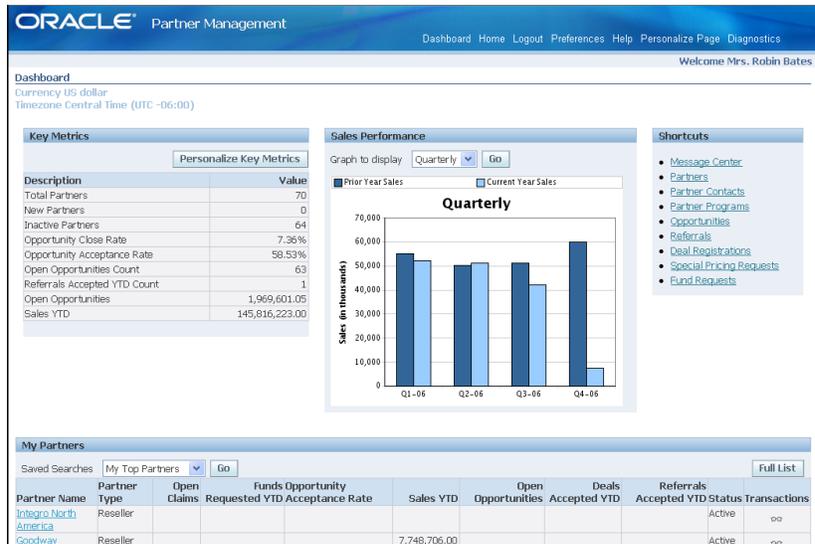


Figure 2. The Channel Manager Dashboard

## Partner Profiling Segments Partners To Improve Promotion Targeting

Different partners need different treatment. Oracle Partner Management's flexible partner profile attributes let you segment partners by common characteristics, such as type, geography, and any user-defined attributes. You can segment partners for promotions based on any combination of attributes, even using key performance indicators to target high or low performers. Partner profiles provide a central repository for company and contact information, program enrollment status, two-tier relationships and more. Links in the profile drill through to detailed transaction history, including opportunities, referrals, special pricing requests, offers, orders, marketing fund requests, and claims.

## Partner Program Management Dynamically Manages Entitlements

Oracle Partner Management includes a configurable program management framework that simplifies the creation and management of partner programs. Oracle Partner Management uses profile attributes to automatically determine partner program membership eligibility. Partners enroll into programs from the partner dashboard, and receive entitlements once their enrollment is approved. The system models global and subsidiary member types as well as two-tier partner relationships. Value-added distributors can view their managed partners' profiles and invite them into programs. Program management supports upgrade path relationships and both hard and soft enrollment pre-requisites. You can even copy existing programs to speed new program creation.

## Oracle E-Business Suite -- The Complete Solution

Oracle E-Business Suite enables companies to efficiently manage customer processes, manufacture products, ship orders, collect payments, and more—all from applications that are built on unified information architecture. This information architecture provides a single definition of your customers, suppliers, employees,

### RELATED PRODUCTS

The following related products are fully integrated with Oracle Partner Management:

- Oracle Sales
- Oracle Quoting
- Oracle Marketing
- Oracle Accounts Receivable Deductions Settlement
- Oracle Channel Rebates and Point-of-Sale Management
- Oracle iStore
- Oracle Order Management

products—all aspects of your business. Whether you implement one module or the entire Suite, Oracle E-Business Suite enables you to share unified information across the enterprise so you can make smarter decisions with better information.

#### RELATED SERVICES

The following services support Oracle Partner Management:

- Oracle E-Business Suite Accelerators
- Oracle On-Demand
- Product Support Services
- Update Subscription Services
- Oracle Consulting Services



#### CONTACT US

For more information about Oracle iStore, visit [oracle.com](http://oracle.com) or call +1.800.ORACLE1 to speak to an Oracle representative.

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#### Hardware and Software, Engineered to Work Together

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