

Channel sales

Version 8.0



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Getting started

PRODUCTS: SALES ENTERPRISE

The partner portal is designed for companies that work with customers via partner networks. This portal is a joint communication platform for passing leads between partners, partner cross-sales, and marketing campaign team-ups.

The partner portal functionality is available in Sales Creatio enterprise and CRM Creatio.

Your partners can work with these sections:

- [*Leads*]
- [*Opportunities*]
- [*Orders*].

These sections are duplicates of the main application sections of the same name. You can choose which fields and details from the [*Cases*] section to display in the [*Portal Cases*] section via the Section Wizard. Lead and opportunity details are available in the [*Partner program*] portal section and on the partnership page in the main application. These data are used to keep track of how the partnership conditions are fulfilled, how higher partnership tiers are achieved and how marketing funds are credited.

Portal users can access the basic portal functionality - main page, user profile settings, knowledge base search, feed communications, etc.

You can set up partner sales analytics in the dashboards on the portal main page. More information about setting up the portal main page is available in the "[Set up the portal main page](#)" article.

You can add up to three custom sections on the customer portal. Custom sections are [configured via the Section Wizard](#) and are added to the "Portal" workplace.

Partner organization access permissions

To access the "Partner portal" configuration, add the partner organization to the "Partner portal users" functional role. You can read more about the types of portal users in the "[Users and permissions on the portal](#)" article.

Portal licensing

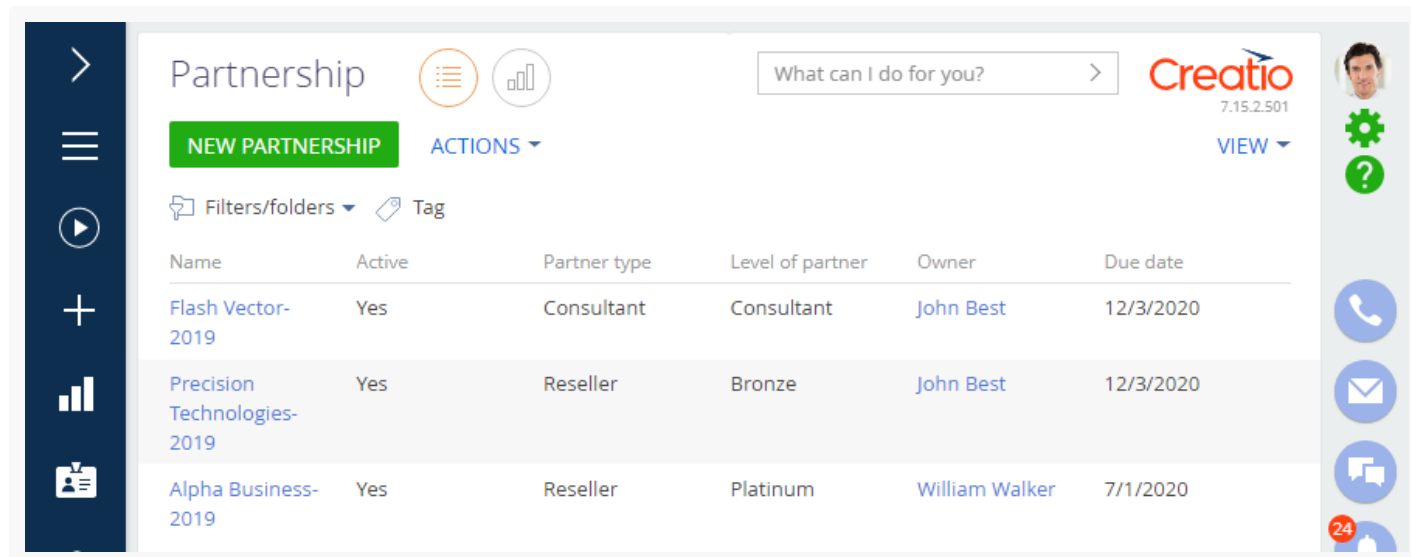
Each portal user "consumes" a special "portal license" (as opposed to using regular Creatio licenses). The name of the partner portal license must contain the "partner portal on-site/cloud" string. Read more about licensing in the "[Creatio licensing](#)" article.

Prepare the partner portal for work

You can find the data about your company's partners and related partnerships (their conditions and status) in the [*Partnership*] section of the main application. This section is best suited for use by your employees responsible for interaction with your partners. You can use it to set up the cooperation conditions and add as

many partnerships as needed but no more than one per each partner ([Fig. 1](#)). The partner portal displays the conditions of a partnership as a partner program.

Fig. 1 The [*Partnership*] section in the main application



Note. You can manage partners performance and set up the cooperation conditions in the main Creatio application.

The partner programs are configured in the main application. Partner portal users can only access the profile of their own organization. The partner program access on the portal is read-only. The [*Partner program*] section is available for access by your partners and their employees. This section contains all information relevant to your partners and their work ([Fig. 2](#)):

- Current partner tier and performance indicators required for a level-up.
- Partner reward, such as a percentage of their profits.
- Partner training sessions and certifications.
- Funds and amount of funds.
- Credit and debit operations.
- Marketing activities of the partner.
- Partnership parameters history.
- Partner lead and opportunity analytics.
- Additional information.

Fig. 2 A partner program page on the portal.

Note. You can only bind a single partner program to each partner.

To prepare the partner portal for work:

1. [Outline your partner program](#). Setting up a partner program is a one-time procedure.

We recommend that you capture your partner program parameters on paper or in a spreadsheet. Specify the types of partners you work with. For example, a “reseller”, “consultant”, etc. Set forth the partner tiers and requirements to achieve a new tier. For instance, “Bronze,” “Silver,” and “Platinum” tiers for a “Reseller” partner. You can define the cooperation conditions (parameters) for each tier individually. Such parameters can include the number or amount of opportunities, the number of leads, interest debit payable to the marketing funds, etc.

2. [Transfer the parameters](#) of the partner program to the main Creatio application. The parameters are entered once.

Make sure to populate the [*Type of partner*], [*Level of partner*], [*Level partnership parameters*] and [*Category of partnership parameter*] lookups with your parameters.

3. [Set up personal price lists](#) to take into consideration special conditions for working with partners. This action is run for each partner individually.
4. [Add a new partnership](#) in the [*Partnership*] section in the main application.

Adding an active partnership in the main application means that you have reached an agreement with the partner and they officially begin participating in your partner program. The newly created partnership will be available to the partner as a partner program.

5. [Create a portal organization](#) for an account of the “Partner” type. Bind partner portal users to the organization and set up corresponding permissions.
6. [Send a portal invitation email](#) to the employees of the partner.

Set up partner program parameters

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Creatio comes with a set of tools for configuring partner programs, such as special lookups with pre-set partnership parameters. You will need to examine these pre-set parameters and modify them to suit your specifics. You can also come up with your own partnership parameters and add them to Creatio [lookups](#).

To set up custom partnership parameters, populate the [*Type of partner*], [*Level of partner*], [*Level partnership parameters*], and [*Category of partnership parameter*] lookups accordingly.

Attention. When you edit the content of lookups, do not delete base content. Otherwise, essential functionality failure may occur.

1. **Type of partner** is the type of your company and your partner company’s cooperation. The [*Type of partner*] lookup contains the following default types: “Reseller,” “Consultant,” “Reference,” and “Integrator.” If you work with partners of other types, you must add these types to the this lookup.
2. [**Level of partner**] is the tier for each type of partner, as well as the target number of points needed to reach that tier. The partners get their points for reaching the performance indicators specified in the [*Category of partnership parameter*] lookup. When a partner collects the target number of points, they get to the next tier, and their collected points reset. For example, a “Reseller” partner has three tiers: bronze, silver, and platinum.
3. [**Category of partnership parameter**] is a lookup with a list of parameters to evaluate the performance of a partner. This can be the number of leads, the sum of opportunities, the number of certified experts, the marketing budget, and so on.
4. [**Level partnership parameters**] is a lookup that is used to make the rules and conditions of a partnership for each individual tier of the partner program. It uses the values of all lookups specified above. In [Fig. 1](#) , you can see an example of partnership conditions for a “Bronze” reseller. In this example:
 - a. The “Leads number” and “Opportunity amount” parameters are required for a partner to reach the Bronze level. Parameter type – **Obligation.**
 - b. The “Margin” parameter type is the reward of the partner. As soon as the partner reaches the Bronze level, they will have a 10% discount. Parameter type – **Benefit.**
 - c. The “Price list” parameter determines special prices for partners of a specific level. Parameter type – **Benefit.**
 - d. The “Marketing funds” parameter determines the percentage of the opportunity sum that will be paid to the partner marketing funds when a partner closes the opportunity with the “Closed won” status. Parameter type – **Benefit**.

For example, by closing opportunities with the total sum of 100,000 and registering 10 leads, the partner will get 80 points for fulfilling the criteria of each of the parameters. As a result, they will get the Bronze

level and a 10% discount. 1% of each successful opportunity will be credited to the marketing funds.

Fig. 1 Partnership parameters for a Bronze-tier reseller.

Partner Level	Partner Param Category	Parameter Type	Score	Parameter value type	Value (decimal)	Value (inte...)
Consultant	Annual Revenue	Obligation	80	Decimal	20,000.000	0
Silver	Leads number	Obligation	80	Integer	0.000	50
Silver	Opportunity amount	Obligation	80	Decimal	500,000.000	0

As a result, the partnership program will be based on the values specified in the lookups. Learn more about setting up a partnership program in the [“Example of setting up a partner program”](#) article.

Set up special conditions of partner cooperation

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When working with partner orders, you can use either the general or personal price lists for different partner categories. We recommend setting up personal price lists if you need to take into consideration special conditions of cooperation with your partner. Learn more about price list types and setup in the “Creatio price lists” article.

When working with a partner order, the price is determined as follows:

- Creatio checks whether any personal price list is specified for the partner account and uses the price from that price list. A personal price list is specified on the page of the partner account.
- If the partner has no personal price or such price list does not contain prices for the ordered products, the order will use the price from the price list specified on the [*Partnership parameters*] detail of the active partnership. You can specify this price list in the [*Level partnership parameters*] lookup when finalizing the partnership conditions. More information on setting up the partnership parameters is available in the [“Set up partner program parameters”](#) article.
- If none of the above price lists are provided, then the price from the “Base price list” system setting is used.
- If the base price list is not set, the order will use the price specified on the product page.

To set up price lists, do the following in the main Creatio application:

1. Create a price list with a special product price. To do this, use the [*Price lists*] lookup and the [*Prices*] detail on a product page.
2. Add a [*Price list*] field on the partner account page. To add a new field (column), use the Section Wizard tool in the [*Accounts*] section.
3. Specify the personal price list on the pages of the corresponding partners.

You can learn more about setting up personal price lists in the “Creatio price lists” article.

As a result, each time a product with a special price is added to the order of the selected partner account, such price will be taken from the personal price list specified on the partner account page.

Working with partner funds

PRODUCTS: SALES ENTERPRISE

Creatio can credit a specific percentage of interest to the funds of partners. Use this logic to automate working with the marketing funds. Creatio can automatically credit a percentage from the amount of an opportunity that the partner successfully closed – to special “marketing funds.” The partner can use the marketing fund to initiate promotions and other marketing activities. Creatio will then deduct the activity budget from the partner’s marketing funds.

You can also add custom partnership funds and manually credit or debit them.

Set up the funds

In the Creatio main application, perform the following actions:


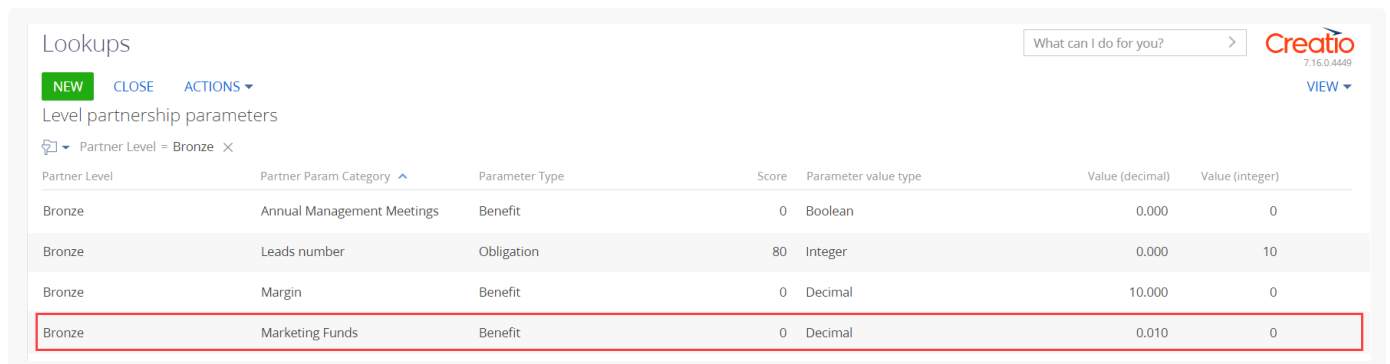
1. Click  in the main Creatio application.
2. Go to the [*System setup*] block → click [*Lookups*].
3. Open the [*Level partnership parameters*] lookup.
4. Set parameters of fund credits as per the partner levels ([Fig. 1](#)).

Fig. 1 Parameters of crediting the marketing funds for a “Bronze” level partner



Partner Level	Partner Param Category	Parameter Type	Score	Parameter value type	Value (decimal)	Value (integer)
Bronze	Annual Management Meetings	Benefit	0	Boolean	0.000	0
Bronze	Leads number	Obligation	80	Integer	0.000	10
Bronze	Margin	Benefit	0	Decimal	10.000	0
Bronze	Marketing Funds	Benefit	0	Decimal	0.010	0

5. Add a partnership. You can learn more in the [“Example of setting up a partner program”](#) article. Note that the [*Active*] checkbox on the partnership page must be selected to be able to work with funds.

As a result, the specified parameters for crediting the marketing funds will automatically display on the partner page in the main application ([Fig. 2](#)), as well as on the [*Partnership parameters*] detail on the portal. A [*Marketing fund*] record will be added on the [*Funds*] detail. When an opportunity is closed with the “Closed won” result, the marketing funds will be credited with the percentage of the amount from the opportunity budget. This percentage depends on the partner level.

You can add another fund manually by clicking  on the [*Funds*] detail.

Fig. 2 Partner program page in the main application

The screenshot displays the 'Feature IT-2020' partnership page in the Creatio application. The page is organized into several sections:

- GENERAL INFO:** Shows 'Current level' (3) and 'Current point' (80). Details include Name (Feature IT-2020), Partner type (Reseller), Margin, percent (10.00), Start date (5/21/2020), and Due date (5/21/2021). The 'Active' checkbox is checked.
- MARKETING ACTIVITIES:** Shows 'Total sales' (0.00) and 'Marketing activities' (0).
- OPPORTUNITIES AND LEADS:** Includes a table for 'Education and certification' and 'Partnership parameters'. The 'Partnership parameters' table has columns for Parameter, Type, Kind, and Current value.
- Funds:** A table showing the 'Marketing fund' with an 'Available amount' of 5,013.50.
- Operations:** A table showing operations with columns for Type, Description, Amount, Fund, and Date.

You can view the remaining sum of the funds on the partnership page under [*General info*] → [*Funds*]. Partners can access this information by opening the partnership page on the portal.

Credit or debit the funds

The funds are credited automatically when a partner opportunity is closed with the “Closed won” status. The amount of funds is recalculated based on the opportunity sum, opportunity stage, or the partner. When an opportunity is deleted, the corresponding sum is debited from the amount of the marketing funds. These actions display on the partner page → [*General info*] → [*Operations*] of the partnership page in the main application, as well as on the portal.

You can also credit or debit funds manually. Manual operations are available for marketing funds as well as for other types of funds.

To charge or write-off funds:

1. Open the partnership page in the main application.
2. Go to the [*General info*] tab → [*Operations*] detail → click +.
3. Populate the fields on the opened page:
 - a. [*Type*] - select the type of operation: credit or debit.
 - b. [*Fund*] - specify the name of the fund.
 - c. [*Amount*] - specify the sum for crediting or debiting.
 - d. [*Description*] - add comments to the operation. This field is optional.
4. Click [*Save*] (Fig. 1).

Fig. 1 Example of a credit operation to the fund

Feature IT-2020 / Cashflows

SAVE CANCEL

Type* Credit

Fund* Marketing fund

Amount* 5,000.00

Additional funds

Description

The changes will display in the main application, as well as on the portal. The partners only have permission to view the [*Operations*] and [*Funds*] details.

Budgetg partner activities from the funds

When a partner adds a new marketing activity in the [*Marketing activities*] section on the portal, the partnership page of the main application displays a record with the “Partner activity” type on the [*Marketing activities*] tab. The partner will be specified as the portal organization account.

If you open the record, you can specify the portal user as the activity owner and set the marketing activity budget (Fig. 1).

Fig. 1 Partner program page in the main application

CRM Days

SAVE CANCEL ACTIONS

Title* CRM Days

Channel* Partner referral

Owner William Walker

Type Partner Activity

Partner Feature IT

Fund Marketing fund

Status* Completed

Marketing plan CRM Day

Url srmdays.com

Partnership Feature IT-2020

GENERAL INFORMATION ATTACHMENTS AND NOTES FEED

Planned budget, US Dollar 100,000.00

Actual budget, US Dollar 1,000,000.00

Start date* 4/23/2020

Due date* 4/23/2020

If you specify a marketing fund in the [*Fund*] field of the record, the corresponding sum will be automatically debited from the specified fund once you save the record. If you edit or delete a record, Creatio will update the transaction and recalculate the funds. The recalculated funds display on the [*Operations*] detail of the partner

program.

You can also create partner activities in the main application. The funds will be debited similarly.

Example of setting up a partner program

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Let's walk through the steps of preparing a partner portal and creating a partner program to start working with the partner.

Case. Set up a partner program. Under its conditions, you grant a discount to a reseller partner. The discount sum depends on the number of registered leads and the sum of closed opportunities. Additionally, the partner program provides your partners with the ability to achieve a new tier: from the Bronze tier to the Platinum tier. Your partners can also have extra discounts. The amount of such discounts grows as your partner reaches new tiers.

Specify your and your partner's cooperation parameters

If you are already working with your partner under certain conditions, you can streamline your cooperation parameters and capture them on paper or a spreadsheet. For instance, the parameters of a reseller partnership can be represented as in [Fig. 1](#):

Fig. 1 Table with partnerships parameters

Category of parameter	Type of parameter	Reseller		
		Bronze	Silver	Platinum
Leads number	Obligation	10	20	30
Opportunity amount	Obligation	100000	500000	1000000
Discount	Benefit	10%	15%	20%

Based on this, you will need to populate the lookups as follows:

- [*Type of partner*] - "Reseller."
- [*Level of partner*] - "Bronze," "Silver," "Platinum."
- [*Category of partnership parameter*] - number of leads, opportunity amount, partner discount, percentage of credits to the marketing fund.
- [*Type of partnership parameter*] - "Obligation," "Benefit."

Set up partner program parameters

The partnership parameters in [Fig. 1](#) are available in Creatio out of the box. You only need to add the partnership

parameters required for the cooperation with your partner if they are not yet available in the lookups.

Add new partnership

1. Open the [**Partnership**] section in the main application. This section is available in Sales Creatio enterprise and CRM Creatio. You may need to add the [*Partnership*] section to at least one workplace before it becomes available in the left menu.
2. Click the [**New partnership**] button.
3. Populate the fields in the mini page that pops up. Refer to the partnership parameters table when populating the fields.
 - a. Select your company's partner in the [*Account*] lookup.
 - b. Specify the type of your partner in the [*Type*] field.
 - c. Specify the time frame of the partner program using the [*Start date*] and [*Due date*] fields. The period is 1 year by default.
 - d. Leave the [*Active*] check box selected if you want the portal page to display the partnership as a partner program. At the same time, you can uncheck this checkbox when needed and make the partner program unavailable to your partner (e.g., when creating different programs for different periods).
4. Save the changes ([Fig. 1](#)).

As a result, the specified partner parameters in the lookups, including the partner funds, will automatically display in the main application, as well as in the partner program on the portal.

Note. Only users with the “Partner portal users” role may have access to the partner program.

Fig. 1 Adding a new partnerships and partner program

Name	Active	Partner type	Level of partner	Owner	Due date
Flash Vector-2019	Yes	Consultant	Consultant	John Best	12/3/2020
Precision Technologies-2019	Yes	Reseller	Bronze	John Best	12/31/2019
Alpha Business-2019	Yes	Reseller	Platinum	William Walker	7/1/2020

Prepare the partner organization for working on the portal

1. Create a partner portal organization and bind it to portal users. This process is covered in the [“Add portal users”](#) article. Please note that you need to choose the “Partners” role in the [*Parent role*] field on the profile organization page when creating a partner portal organization.
2. Configure access permissions for the portal users of the partner organization. To access the partner portal functionality and work in the partner program, a portal user must be assigned the **“Partner portal users”** functional role. More information on the portal user roles is available in the [“Manage portal user roles”](#) article.
3. Send portal invitation emails to partner portal users to enable them to log in to the partner portal and participate in the partner program. The procedure for sending portal invitation is available in the [“Send portal invitations”](#) article.

As a result, users with the “Partner portal users” functional role will be able to access the [*Partner program*] section ([Fig. 1](#)), which stores all conditions and the current status of each partnership.

Fig. 1 The [*Partner program*] section

The screenshot displays the 'Partner Portal' interface for a partner program named 'Axiom-2019'. The left sidebar contains navigation options: 'Main page', 'Partner program' (highlighted with a red box), 'Leads', and 'Opportunities'. The main content area is divided into several sections:

- Summary:** Shows 'Current level' as 1 and 'Current point' as 8.
- Details:** Lists 'Name: Axiom-2019', 'Margin, percent: 10.00', 'Start date: 12/23/2019', 'Due date: 12/23/2020', and 'Active' status checked.
- General Info:** Includes 'Total sales: 0.00' and 'Marketing activities: 0'. It also shows 'Education and certification' (Is active) and 'Partnership parameters' (Target).
- Partnership Parameters Table:**

Parameter	Type	Kind	Current value
Leads number	Current		1
Leads number	Target		10
Margin	Current		10.000
Opportunity amount	Current		0
Opportunity amount	Target		100000.000