Get Started with Partner Adoption

Last updated: 19th November, 2018

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Partner Adoption Management

Companies with partner and reseller programs need a flexible and extensible approach to managing partner tiering within their channel programs and the levels in each program. Program levels should define the criteria by which a partner qualifies, and the requirements to progress to the next level.

The Partner Adoption Management app extends Sales Cloud PRM objects for Channel Program and Channel Program Level. It applies qualification criteria to levels and provides an extensible scoring engine to measure partner performance against the level requirements.

The Partner Adoption Management app sets a point threshold for each partner level, and allows you to set additional qualification requirements.
To support an extensible model, the app allows you to define activities, score values, and score expiration for each Channel Program Level. Each time an activity is added, the appincrements the partner score for the appropriate Channel Program, and similarly recalculates as points expire.

In addition to a points threshold for each Channel Program Level, supplementary criteria can be specified to define points requirements for different activity types. For example, you can specify a certain number of points that must derive from specific activity types, such as certifications, events, sales measures, etc.

This abstracts out scoring definitions and provides flexibility to configure and define events, and their value (certification, event attendance, lead conversion etc) to support measurement against the Channel Program Levels. Activity is a custom object in the app and *any* event you want can be represented by an Activity. It is designed to support an approach that allows scoring events that happen in Salesforce as well and provide a model by which events that take place outside of Salesforce can be integrated and counted.

Should you wish to make changes to this application - the source code is available from github.

Available in: Salesforce Classic and Lightning Experience

Available in: Enterprise, Performance, Unlimited, and Developer Editions

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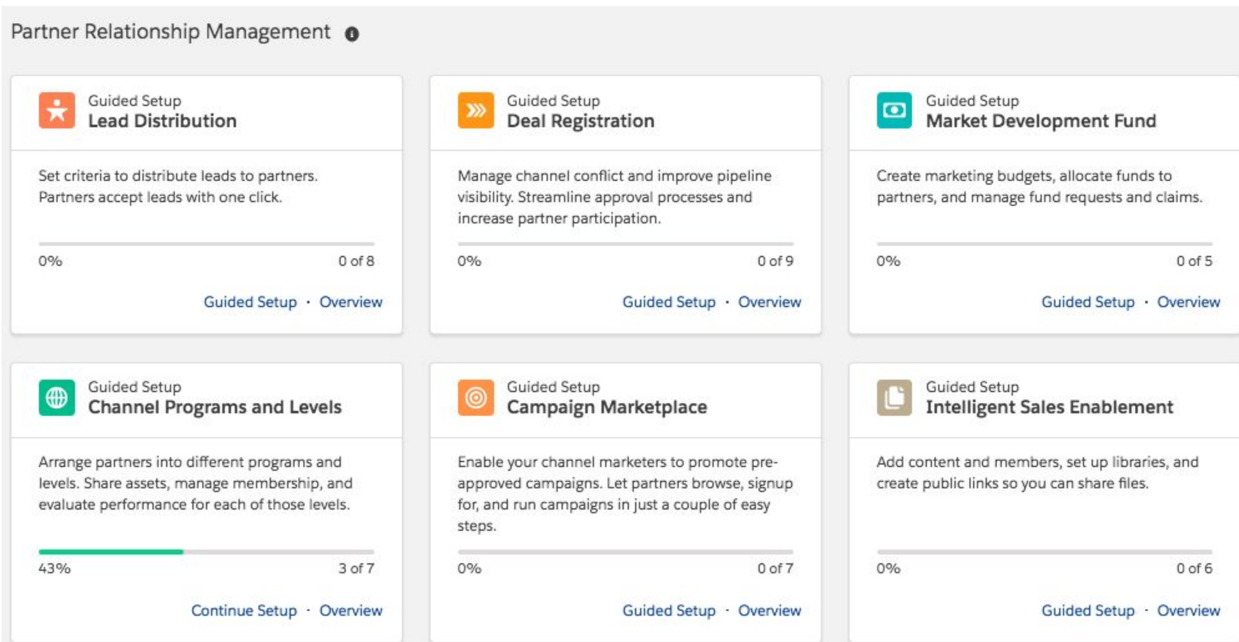
Set Up Partner Adoption Management

To install and configure Partner Adoption Management for your org, complete the following steps.

1. Assign the custom Partner Adoption page layouts for each Channel Program objects (Program, Members, and Levels)
2. Create Channel Programs
3. Create Channel Program Levels for each Program
4. Add Channel Program Members to the Program Levels

Instructions on how to configure Channel Programs and Levels is available in the Community Workspace: Guided Setup | Channel Programs and Levels



Before setting up this app, gather the following information to use in setup:

- What types of activities count towards the criteria for each of the Channel Programs?
- What types of activities are applicable to which Channel Programs and Channel Program Levels?
- For each type of activity:
  - How many points are associated with each activity type for each Channel Program Level?
  - Would you like the points for this activity type to expire after a certain time?
  - Do you want to award points for this activity type during only a certain time period?
- Descriptions of the criteria for each Channel Program Level
- Descriptions of the benefits applicable to each Channel Program Levels
- Icons/images for each of the Channel Program Levels and Activity Type categories

To use this package, follow these steps:

1. Install Partner Adoption from AppExchange (https://appexchange.salesforce.com)
2. The package installs a set of objects, reports and dashboards, and managed Lightning components

3. Prior to incorporating the Lightning components into a community for your partners, please review the following steps to complete setup

User Permissions Needed	
To install AppExchange packages:	Download AppExchange packages
To Configure Partner Adoption:	Manage Communities OR Create and Set Up Communities

Partner Adoption Engine Setup

Partner Activity Type Setup

Partner Activity Types are the definition of how activities or events will contribute to how a partner is scored against the thresholds set for the levels configured in a Channel Program.

Partner Activity Type defines the default number of points for an activity, whether or not those points accumulate or automatically expire and the expiration period. For instance a Partner Activity Type might be configured for product certification and score 100 points that automatically expire after one year.

They include start and end dates to allow the activity type to only score during specific period. For instance early registration for an event or activity related to a time bound marketing campaign.

To set up the Partner Activity Types:

1. Go to Partner Activity Types tab to create activity type you have. Fill in the following fields:

    a. Partner Activity Type Name

    b. Points - Point that will be awarded to partner accounts when they performed an activity of this type. This is the **default** number of points gained from an Activity. Different point values can be assigned to specific programs and levels through the Program Level Activity Point Association related list

    c. Valid from - Date of when this activity type will be valid from (activity of this type occurring before this date will be awarded with 0 points)

    d. Valid Until (Optional) - Similar to Valid From field, Date of when this activity type will be valid until. (Activities that occur after this date will be awarded with 0 points)
    Note: If you don't want a closed valid date range simply leave this field empty.

    e. Category - what category this activity type falls under (You can customize this picklist to match your business requirements)

    f. Description

g. Automatic Expiry - check this box if you wish to automatically expire activities of this type after a certain elapsed time (for example, points from a certification activity may only last for a year when the certificate expires).

h. Expiry Period (Days) - How long will the activities of this type expiry (in days). You will have to supply number of days in this field if you have checked the Automatic Expiry checkbox.

2. Repeat the last step until you have created all the activity types you need

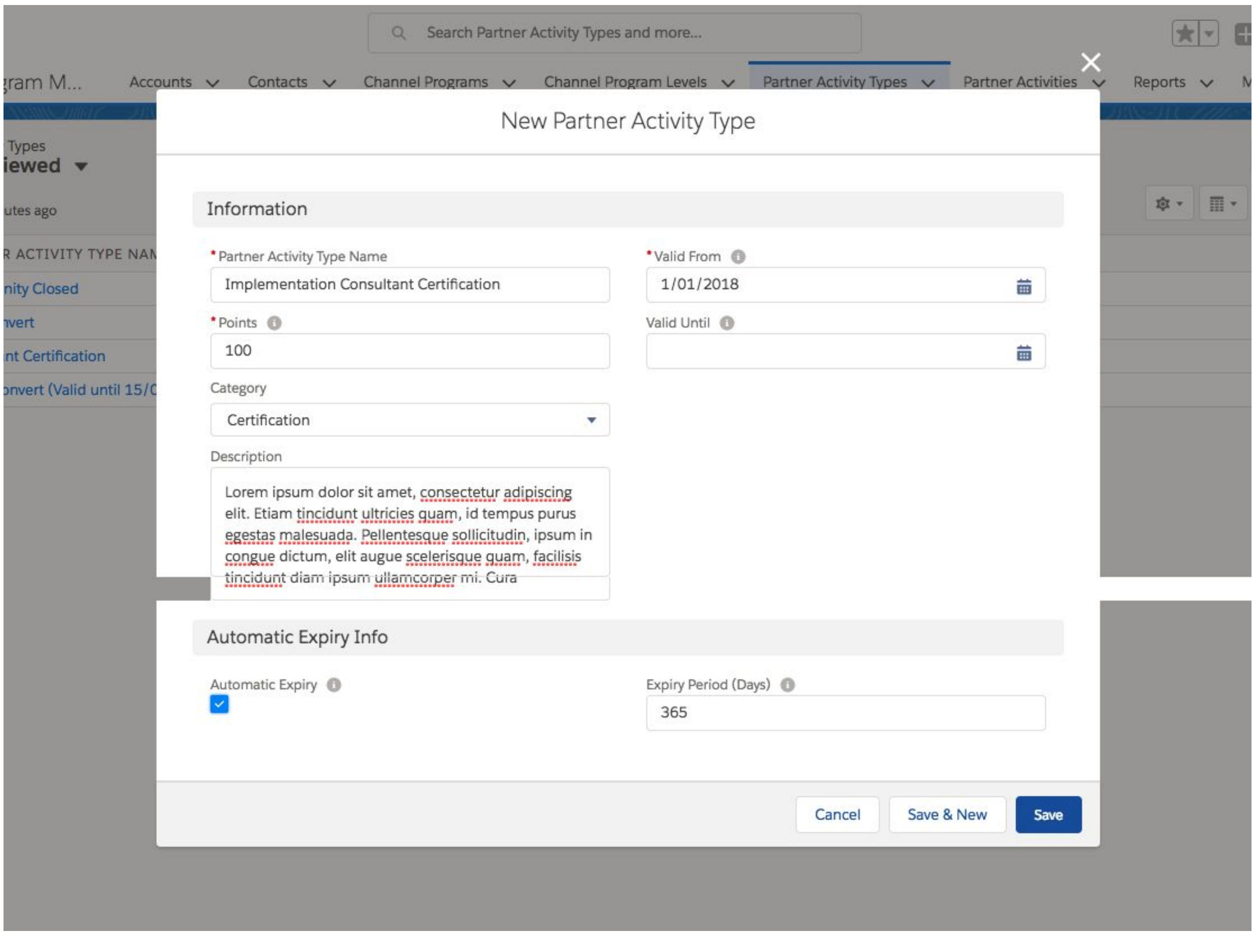


Figure 1: Partner Activity Type Creation

Customize the Categories and Icons

The Category field on Partner Activity type is to provide a way to group or categorize Partner Activities, primarily to support modeling the program contributions and to support easliy grouping similar Activity Types in reports and dashboards. The category attribute also has icons associated with Activity Type that are displayed in the lightning components or community builder found in this package: Partner Adoption, documented in this guide.

By default four values are created for the pick list: Certification, Conference, Sales and Service. The picklist may be configured to uses values that suit your Channel Programs.

Picklist values

Values   New | Reorder | Replace | Printable View | Chart Colors   Values Help

Action	Values	API Name	Default	Chart Colors	Modified By
Edit | Del | Deactivate	Certification	Certification		Assigned dynamically	Derrick Vuong, 23/02/2018 2:17 PM
Edit | Del | Deactivate	Conference	Conference		Assigned dynamically	Derrick Vuong, 23/02/2018 2:17 PM
Edit | Del | Deactivate	Sales	Sales		Assigned dynamically	Derrick Vuong, 23/02/2018 2:17 PM
Edit | Del | Deactivate	Service	Service		Assigned dynamically	Derrick Vuong, 23/02/2018 2:17 PM

Category Icon URL

Categories can be associated with an icon – this is used primarily in the community UI and should provide the URL for an icon image that can be accessed by all users of the community – such as an asset in the community assets library or a public static resource.

Associate Activity types to Channel Program Levels

Activities Types are associated with Channel Program Level to allow Activity Types to apply only to specific Levels in one or more Channel Programs. For instance, converting a lead might only count for bronze level partners.

As part of that relationship, a point value is required to allow an Activity Type to score differently according the partners channel program level. An Activity Type can be featured for a partner's Channel Program level. This drives what Activity Types are listed in the Featured Activities Component. In the example below, the Activity Type is only featured to partners currently at the bronze program level.

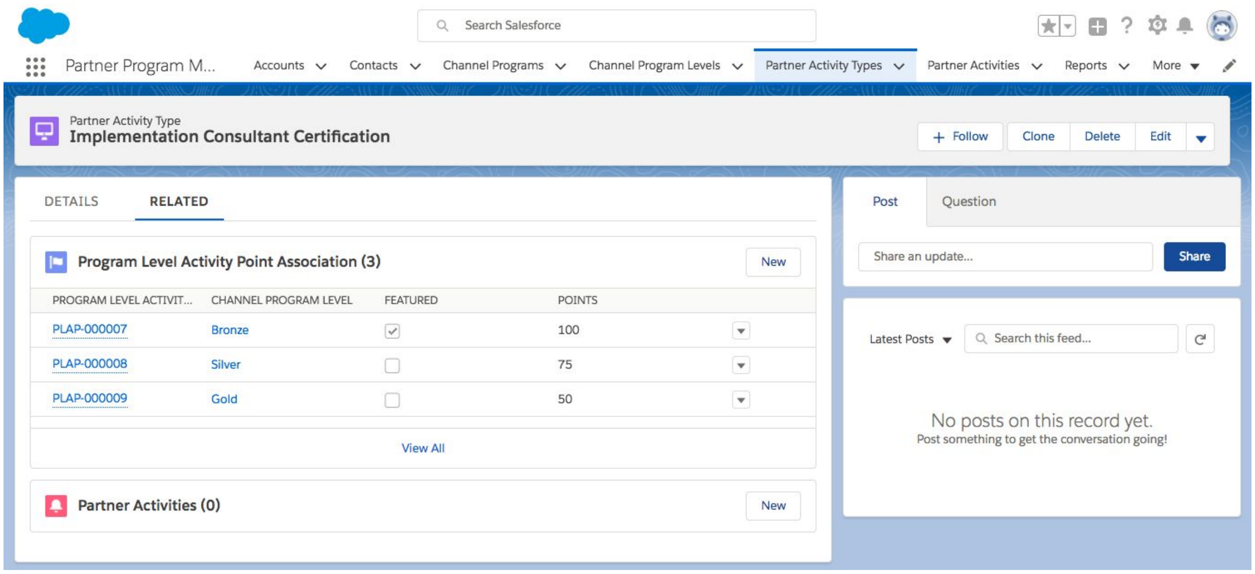


Figure 2: Program Level Activity Point Association – Example related list

To configure the Activity Types and value, repeat the follow steps for each Channel Program Level.

1. On the related tab for “Program Level Activity Point Association” choose “New”
2. Partner Activity type is populated.
3. Select or search for the Channel Program Level you want to associate the activity type with
4. Give it a ”*Points” value.
5. Make it featured or not
6. Continue for each Channel Program and Channel Program Level to which this should count
7. Note on different values per program and level
8. Note Configure “Program Level Activity Point Association” related list fields as desired

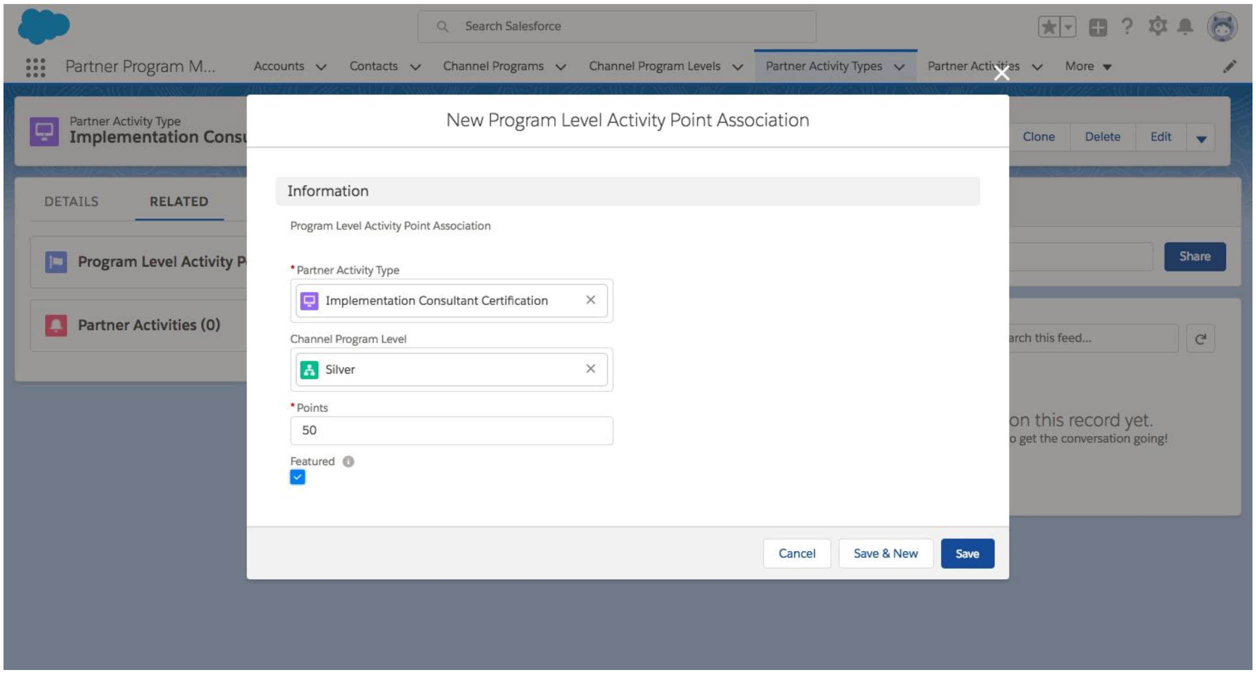


Figure 3: New Program Level Activity Point Association

Configuration from Channel Program Level

Configuration can also be done from the Channel Program Level object. To configure a Channel Program Level, go to the Related tab and choose “New” to associate the level with Activity Types.

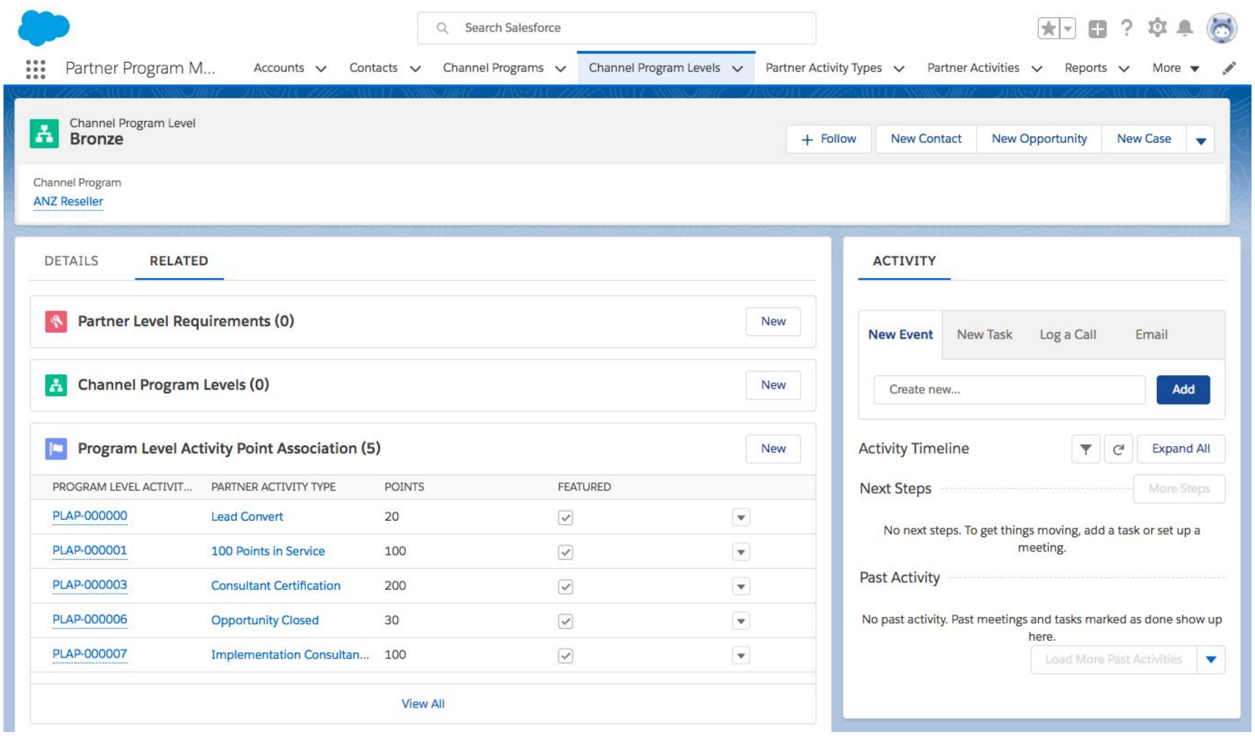


Figure 4: Channel Program Level view of Partner Activity Points

Channel Program Level Package Fields

This package adds the following fields to the Channel Program Level object to allow each level to have a points threshold required to achieve the level, and to associate the level with text and images that will display in the community.

1. **Benefits** (Rich Text Area) which can be used to describe the benefits or features partners receive when qualifying to this level
2. **Icon URL** (URL) is a link to the an image you which to display to community users for the level
3. **Minimum Points** (Number) specifying the minimum number of points a partner must achieve to qualify for this level
4. **Next Level** (Lookup(Channel Program Level)) define which level the next higher level in the program. (Channel Program Level Rank) is not used in calculations but to display to partners their progress to the next level.

5. **Next Level Point Requirement** (Formula (Number) specifies the points threshold to achieve the next Channel Program Level

Channel Program Levels

To configure Channel Programs the fields added by the package need to completed using the following steps.

1. Open each Channel Program Level edit to complete the details for the fields the package installed. Fill in the following fields:
    a. Minimum Points - Minimum points required to reach this Channel Program Level (These must be incrementally larger for each higher level)
    b. Description - Describe the Channel Program Level
    c. Benefits - text to describe benefits that partners with this Channel Program Level can receive
    This can be optionally selected to display in the package components **Partner Adoption Current Level** and **Partner Adoption Progress Info**
    d. Icon URL - publicly accessible URL for level icon. The icon is displayed in the community components: components **Partner Adoption Current Level** and **Partner Adoption Progress Info**
    e. Next level - if this level is not the highest level, select what the next level is after this level. (for example, when you have created a gold level and now you are creating a silver level, in the Next Level field please add Gold as the next level for the Silver level).

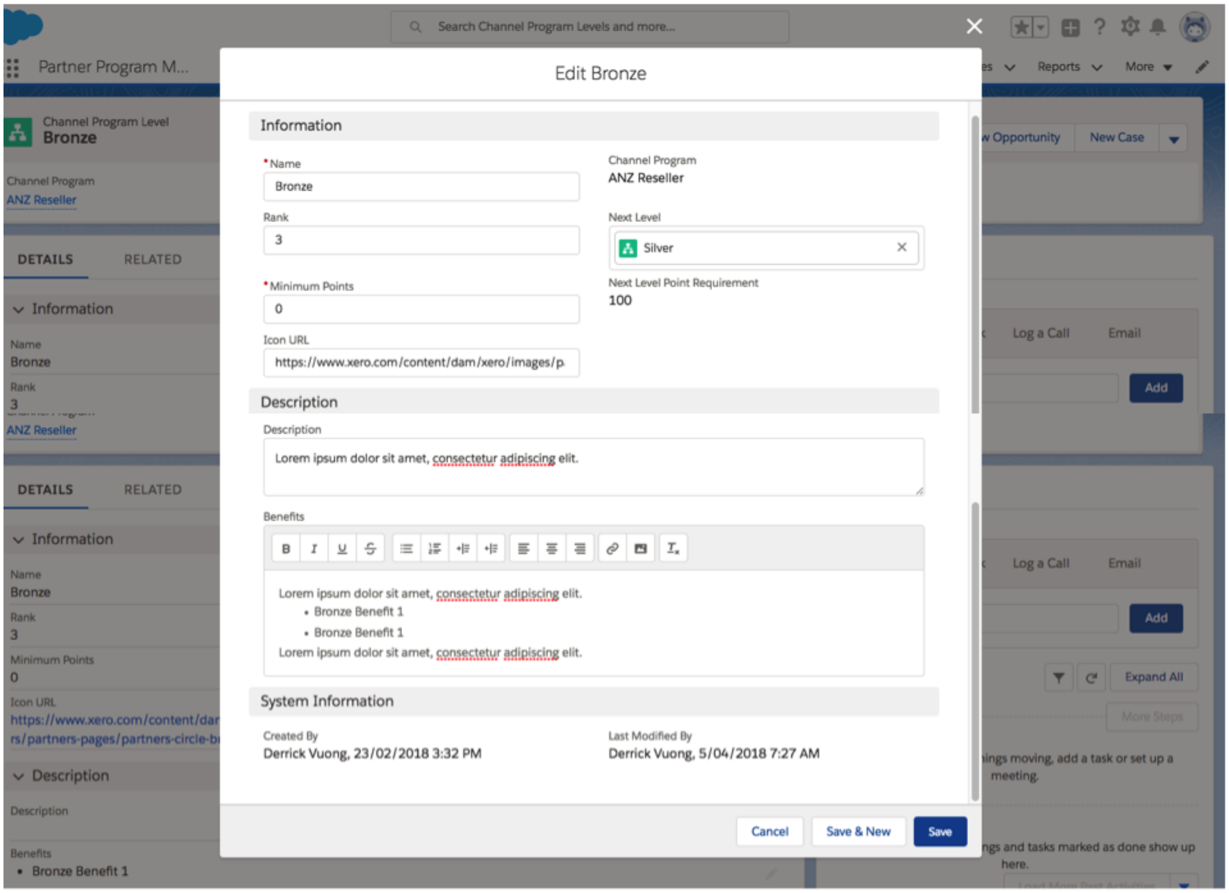


Figure 5: Additional Fields on Channel Program Level

Partner Level Requirements

Partner Level requirements allow additional thresholds to be set for a partner to qualify for a specific level in the channel program. They allow minimums to be established for a specific activity type and are intended to allow the requirements for level qualification to include a mix of Activity Types.

For instance in the example below the bronze level requires 500 points to come from Implementation Consultant Certifications, 1000 from Consultant Certifications, and 350 from converting leads and so on. Hence to specify a level requires a partner have 5 certified resources, and each certification Activity Type is worth 100 point, you would set the the requirement to 500 points.

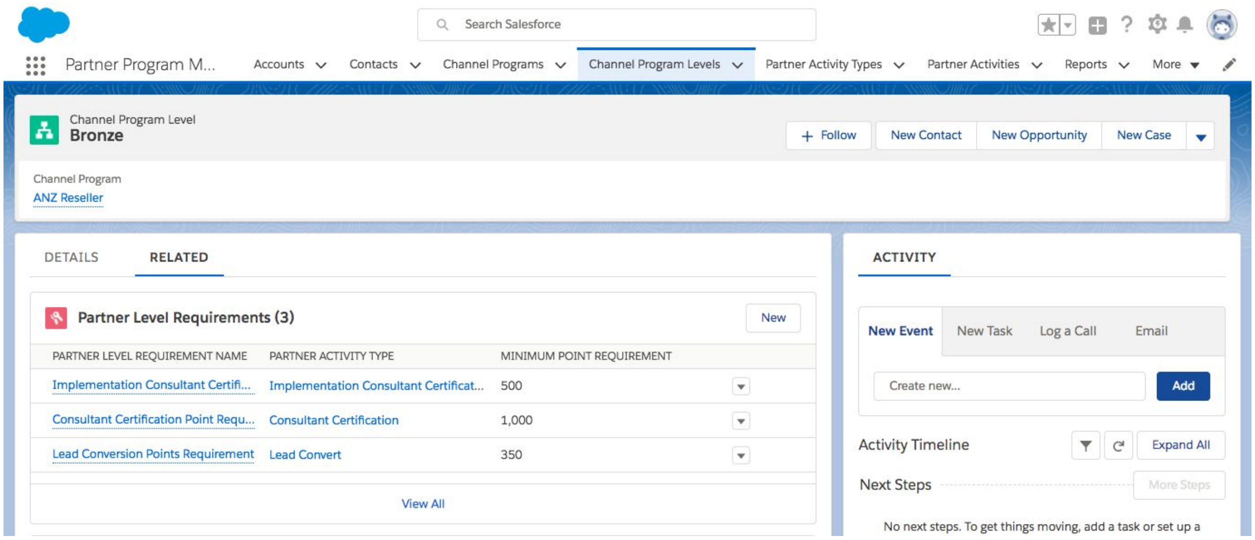


Figure 6: Partner Level Requirements Example Related List

1. (Optional) For each level, go to related list and create level requirements other than minimum point if there is any. For example, to reach silver level, partner must have at least 30 points from “Introducing new customer” activities.
    a. Channel Program Level - the level associated with this requirement
    b. Partner Activity Type - the partner activity type record associated with this requirement
    c. Minimum Point Requirement - minimum points awarded from the associated partner activity type required to reach this level
    d. Partner Level Requirement Name - a meaningful name for your requirement
2. Optional Configure fields in related list for Channel Program Level
3. Repeat the two steps above to edit all the Channel Program Levels.

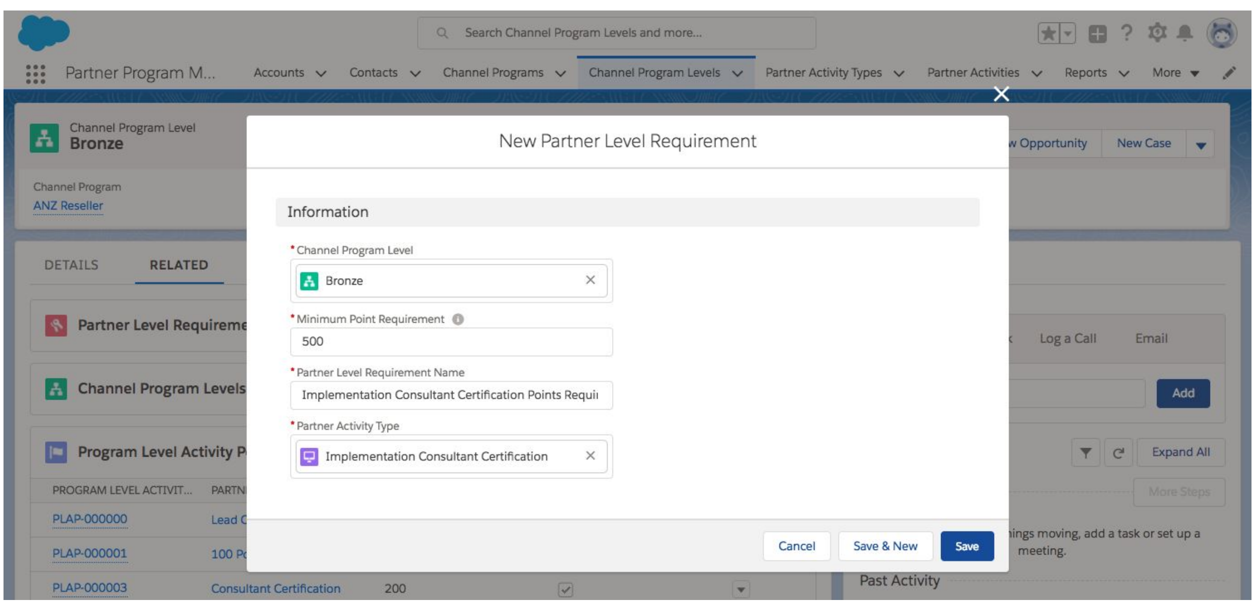


Figure 7: New Partner Level Requirement

Summary

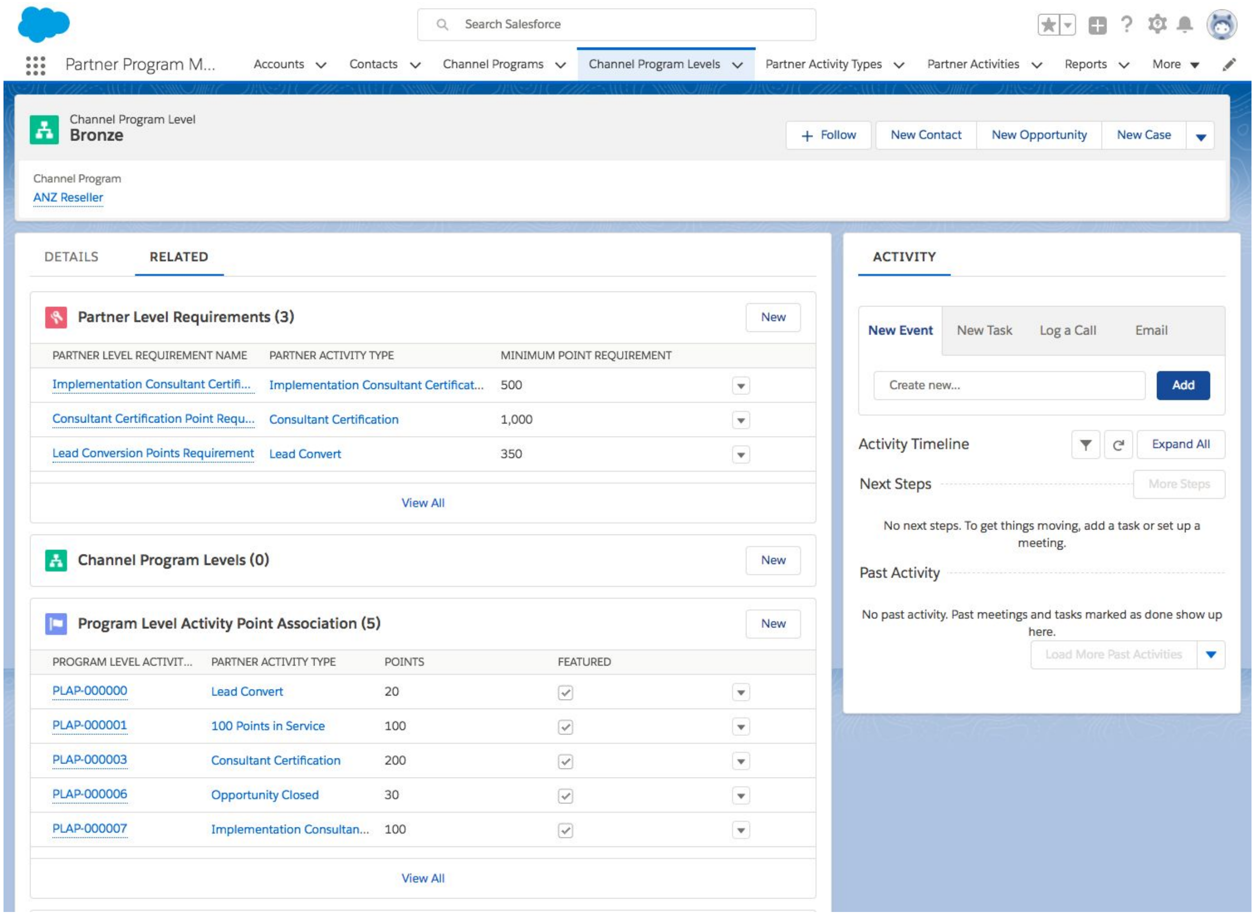


Figure 8: Example of Configured Channel Program Level

So far you should have:

1. Created Activity Types and optionally configure additional categories and their associated icons
2. Associated Channel Program Levels with the Activity Types that apply to that level and set level specific point values
3. Updated Channel Program Levels with details for community display defined the points minimum points required to qualify for the level
4. Associated each Channel Program Level with minimum points for specific Activity Types

Other Considerations

Partners need to be associated with a Channel Program Level. It is recommended all new partner account be automatically assigned to a channel program level.

Award Points to Your Partners

You can achieve this in three ways: creating Partner Activity records manually, or via the API, or automate this process based on data changes in Salesforce.

Manually Create Partner Activity Records

Go to the partner account record detail page and click New Partner Activity action.

1. A Partner Activity must be associated with a Channel Program
2. A Partner Activity must have a Partner Activity Type
3. Description and Participant are optional
4. Points awarded is calculated once the Activity is created

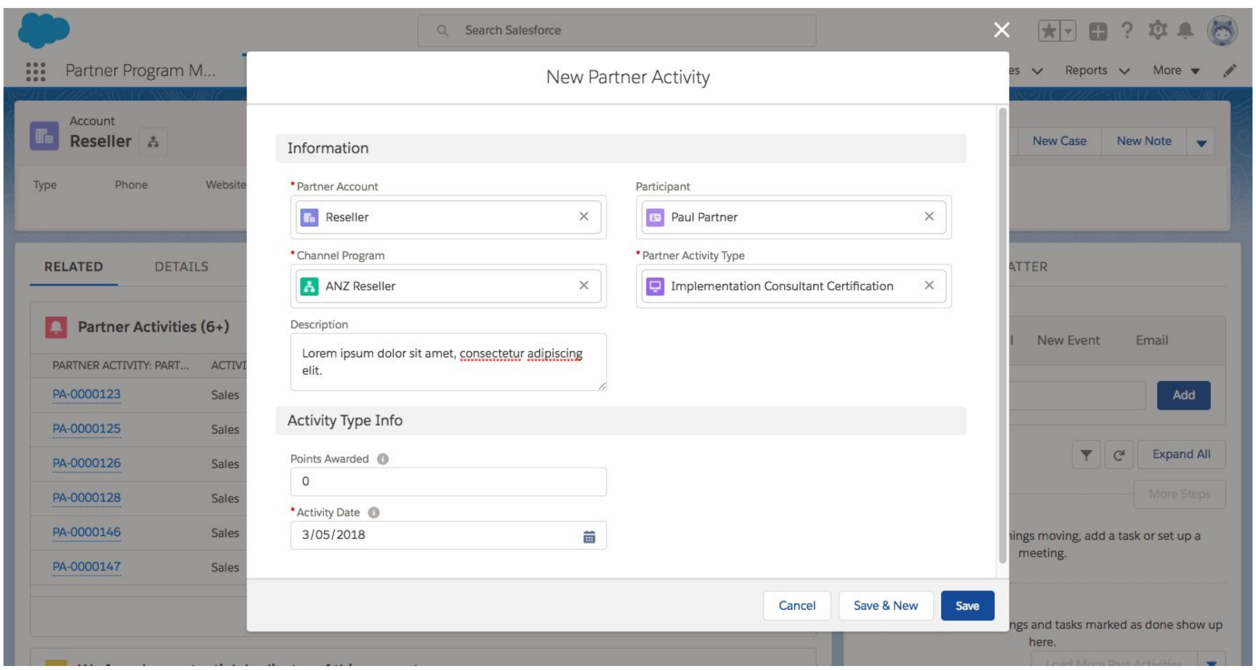


Figure 9: New Partner Activity

Add points by the API

Where the Activity Type is not related to data in Salesforce – it's straightforward to create Partner Activites via integration or even bulk loading to score events or measures external to Salesforce.

How a Partner Activity is Scored

When a Partner Activity record is created the score for the activity is calculated as follows based on the Activity Type:

1. Is the Date for the Partner Activity valid to score (after Activity Type Start Date and before End Date)
2. Does the Partner Activity count for the partner accounts current Channel Program Level (for the Channel Program of the Activity)
3. If it counts than what is the points value for that activity for that level
4. Update the Partner Activity record with the calculated points value
5. Update the Channel Program Member points value for the partner

At this time the points required to qualify for the next level and any level specific partner activity requirements are evaluated and any change in level initiated.

Activities which don't qualify are given a score of zero.

How Do Partner Activity Points Expire?

If the Automatic Expiry check box is checked and the Expiry Period field is not null then a scheduled workflow task is created to that will create an activity on the expiry date with a negative value to subtract the partner activity points. In this way there is a clear record in the Partner Activity stream for expirations.

Sample Process for Automated Scoring

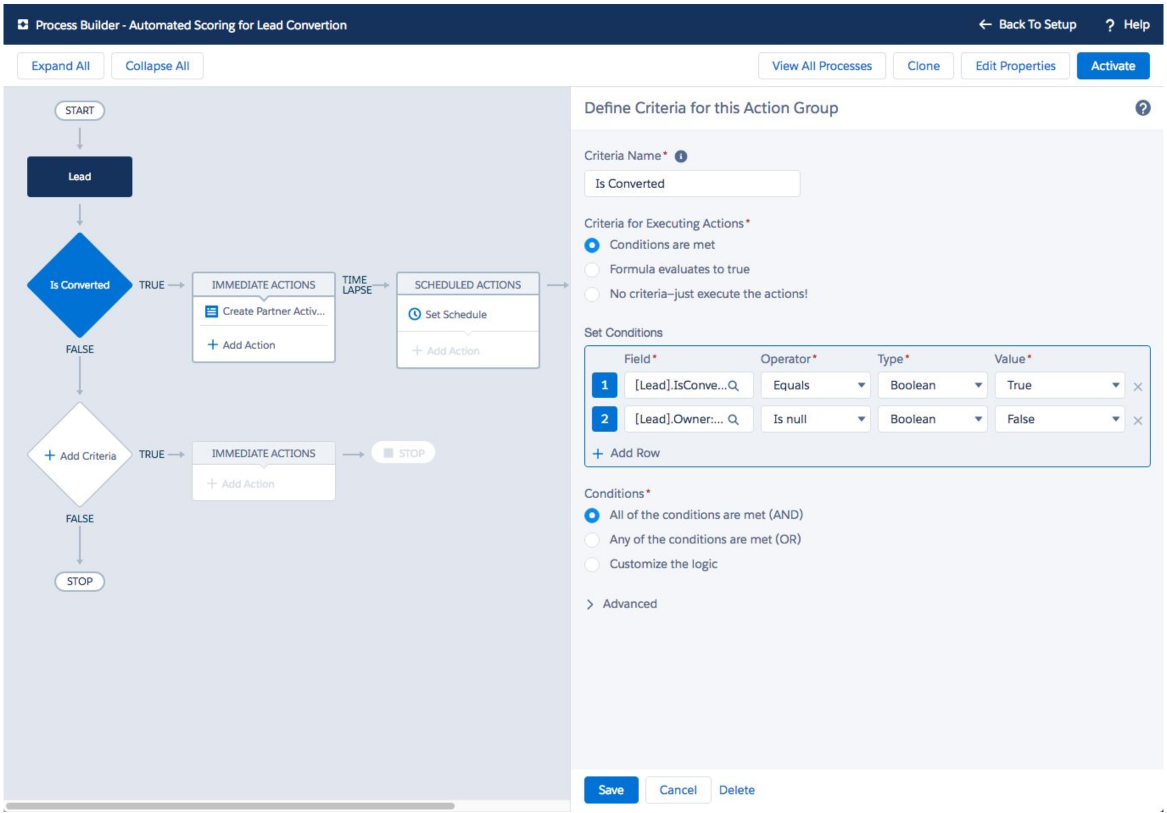
You can fully customize automated scoring on top of this app either on the platform or out of the platform. The expectation in using this app is that you will create automation to score the events and activities that are to be counted in your channel programs. The app itself is a mechanism to score and adjust levels and does not limit what may score.

For example, when partner user converts a lead and you would like to assign points to that. You can achieve that using process builder. Most automation should be achievable with declarative tools however you may choose to use triggers or other code.

View the following example on how we did this:

- Whenever a lead is converted and lead owner's account ID is not null (meaning it is a partner user) an action is triggered to create a Partner Activity that records that lead conversion
- Once the Partner Activity is created the rest of the app logic is initiated to calculate scores
- From the example you should note the record creation requires values for the Channel Program and Activity Type.

- Since the app handles score calculation there should not be any need to include additional conditions on the Partner Activity Creation action



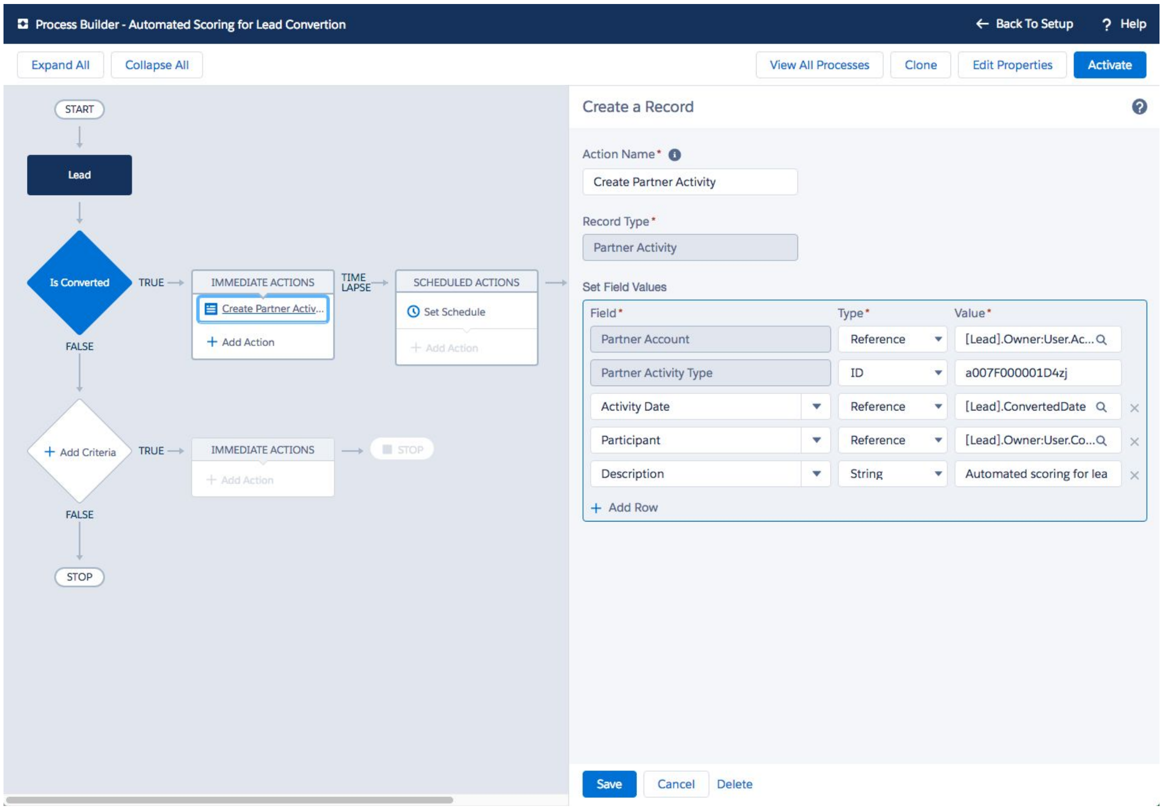


Figure 10: Example Procces for Creating Partner Activity on Lead Conversion

Modifying Process to Upgrade and Downgrade Partners

The logic to change the Channel Program Level are modelled in Process builder with the expectation that they are modified to include logic or action appropriate to how your organisation wants to manage Partner moving up or down a level. Examples may include posting in Chatter to the partner's channel manager or, sending email notifications to warn or congratulate partners.

Partner Account Level Downgrade Process Review

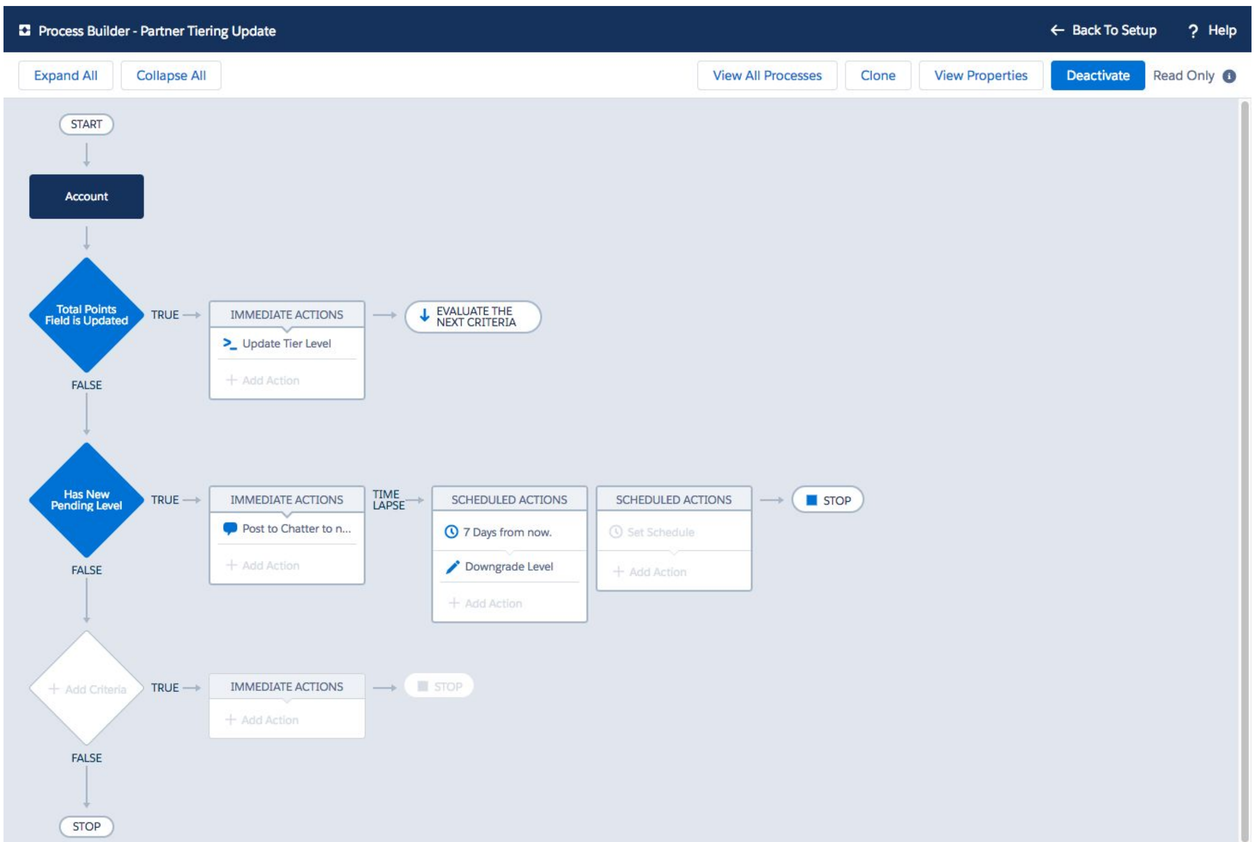


Figure 11: Partner Tiering Update Process

1. Review the packaged processes with partner level changes to add your own notifications etc. Go to Process Builder, Open "Partner Tiering Update" process
    a. When a partner account Channel Program Level is getting downgraded (the partner doesn't meet all the requirements for their current level anymore.). It is designed not to downgrade straightaway. The included process will post to chatter mentioning the partner account owner about this and then schedule a downgrade in 7 days if the partner account still does not meet the requirements to stay.

b. Customizations can be added to change the notifications and length of time to let your partner accounts stay on their level.
c. Channel Program member is marked pending downgrade in this scenario
d. A Partner Activity Type can be configured to allow manual updates to made by adding Partner Activities

2.

Partner Account Level Upgrade Process Review

When the requirements of a the next level are met.

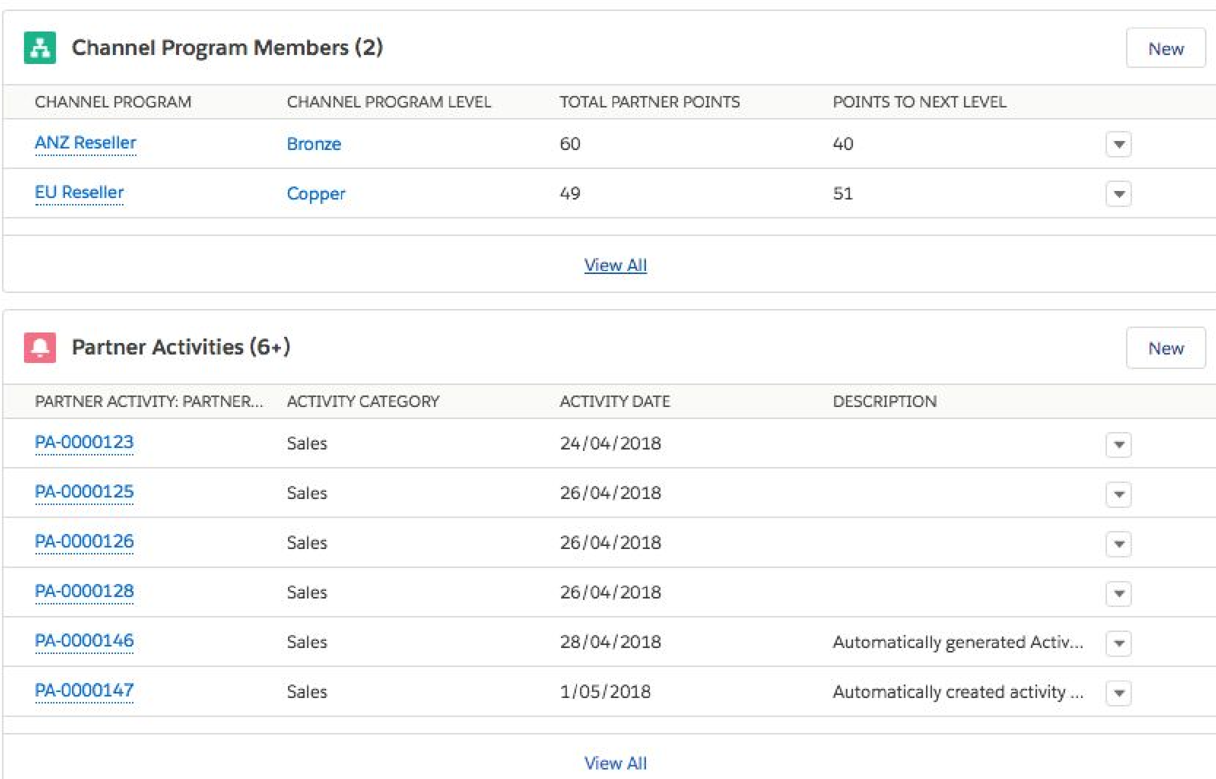
- The Channel Program Member Level is updated to reflect the new level achievement
- Again the process is intended to allow business configuration of other action this event may trigger such as chatter posts, email notification or updates to other systems

Partner Account Internal Layout

The internal layouts for Partner Account Records should be updated:

- Add the Partner Activities Related List and configure the fields to display in the list

- Add Channel Program Members Related List and configure the fields to display in the list


Channel Program Members (2)

New

CHANNEL PROGRAM	CHANNEL PROGRAM LEVEL	TOTAL PARTNER POINTS	POINTS TO NEXT LEVEL
ANZ Reseller	Bronze	60	40
EU Reseller	Copper	49	51

View All

Partner Activities (6+)

New

PARTNER ACTIVITY: PARTNER...	ACTIVITY CATEGORY	ACTIVITY DATE	DESCRIPTION
PA-0000123	Sales	24/04/2018	
PA-0000125	Sales	26/04/2018	
PA-0000126	Sales	26/04/2018	
PA-0000128	Sales	26/04/2018	
PA-0000146	Sales	28/04/2018	Automatically generated Activ...
PA-0000147	Sales	1/05/2018	Automatically created activity ...

View All

Figure 12: Example related lists on a Partner Account Internal Layout

Report and Dashboard Customization

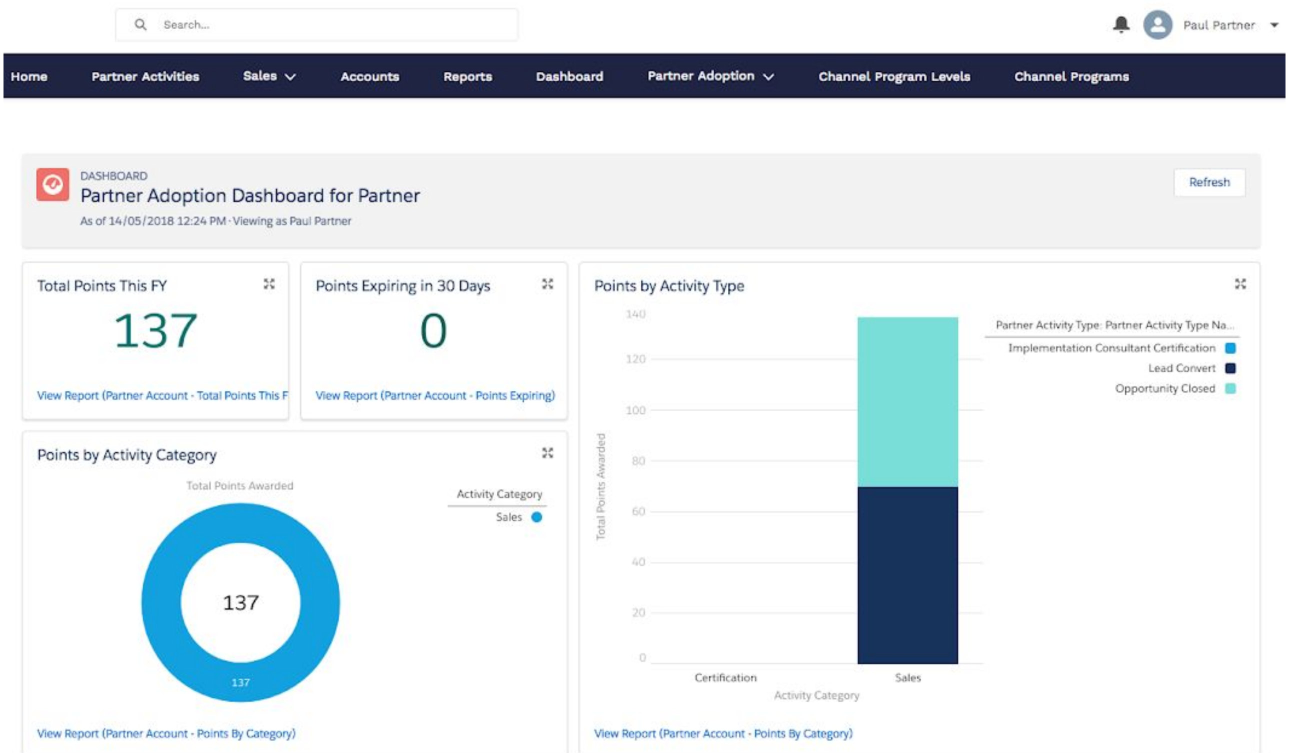


Figure : Partner Adoption Dashboard for Partners

We provide out-of-the-box reports and dashboards located in "Partner Tiering Dashboards" folder for two use cases:

- Partner Account Manager - to view their partner accounts' levels and point activities
  - Partner Account Manager Dashboard
- Partner - to view their own points history, activities (this dashboard can be place in partner community)
  - Partner Tiering Dashboard for Partner

Review the content of the dashboards and add in your own customizations if you require any further analysis.

Figure 14: Partner Account Manager Dashboard

Partner Community Setup (Optional)

Profile and Permission

We included an example permission set for you to add partner users and you can also configure it in profile. Below is a list of permissions it will require for partner users to see their data correctly:

We recommend to create your own to configure to your needs.

- Accounts - Read
- Channel Program - Read
    - All fields
- Channel Program Levels - Read
    - All fields
- Channel Program Members - Read
    - All fields
- Partner Activities - Read + Create
    - All fields
- Partner Activity Types - Read
    - All Fields
- Partner Level Requirements - Read
    - All Fields
- Program Level Activity Point Association - Read
    - All Fields

Note that we are unable to include Partner Activities in permission set due to it has master-detail relationship with Account so don't forget to add this one.

Sharing Settings

- External Sharing Model must be enabled
    - Setup ➔ Sharing Settings ➔ Enable External Sharing Mode
    - Set Account and Contract OWD - Default External Access to Private (for partner to see Dashboard)

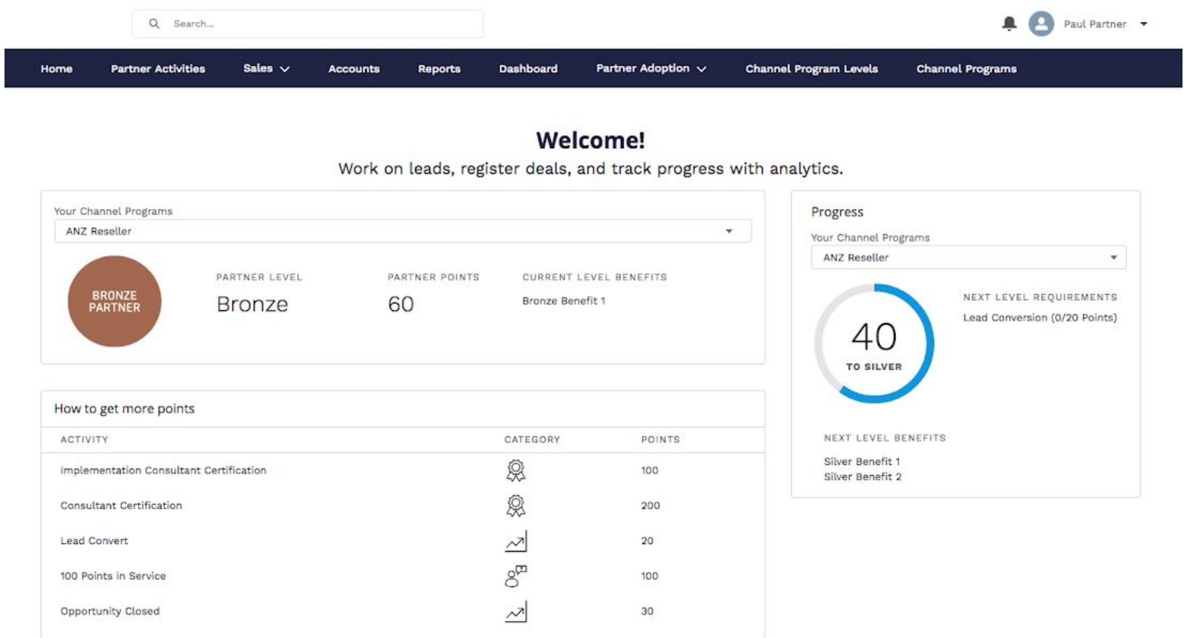
- Channel Program Sharing Rules
  - Owner in All Internal Users shared with All Partner Users - Read Only

Dashboards

There are sample dashboards and reports that come with the package as examples and we would recommend that you tailor them to your needs.

Remember to share the reports and dashboards for the Partner User to view.

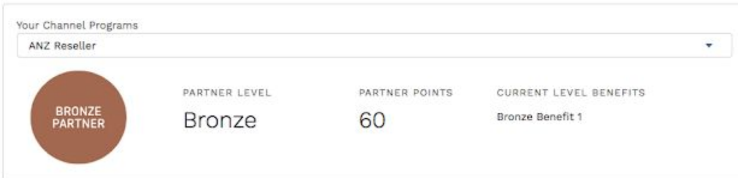
Lightning Components

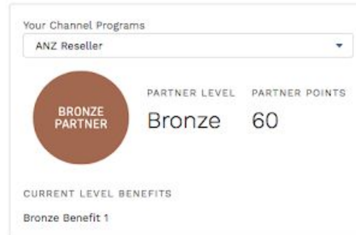


We have included three out-of-the-box Lightning components for partner users.

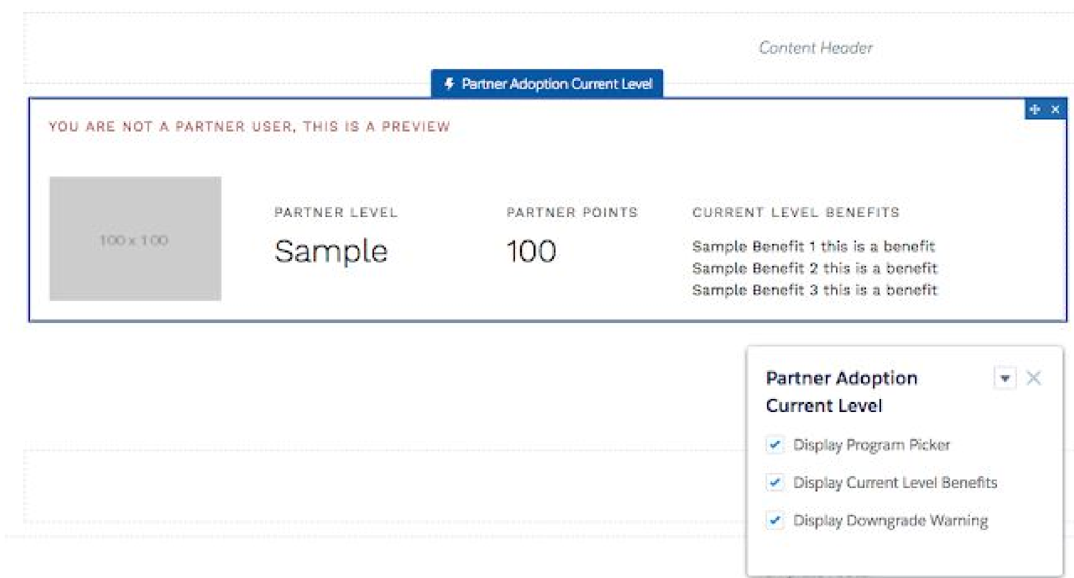
- When the account belongs to multiple Channel Programs, by default the components display for the alphabetically Channel Programs the account is a member of
- When more that one component is used on a community page and the Channel Program is changed – all components will update to reflect the change
- Components are responsive to the page layout section width and will adjust to wide and narrow sections
- Display is simulated in builder as the component logic requires a configured partner user to render

Partner Adoption Current Level

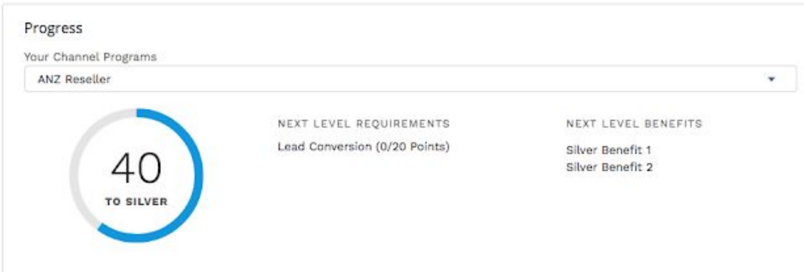


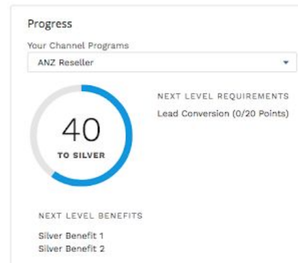


1. Their current Channel Program Level information:
    a. Account Name
    b. Warnings if they are getting downgraded on levels soon
    c. Current Channel Program Level
    d. Total Points
    e. (Optional) Current level's benefits
2. Can be configured in Community Builder to:
    a. Not show downgrade warnings
    b. Not to show the Channel Program picker
    c. Not to display the current level benefits

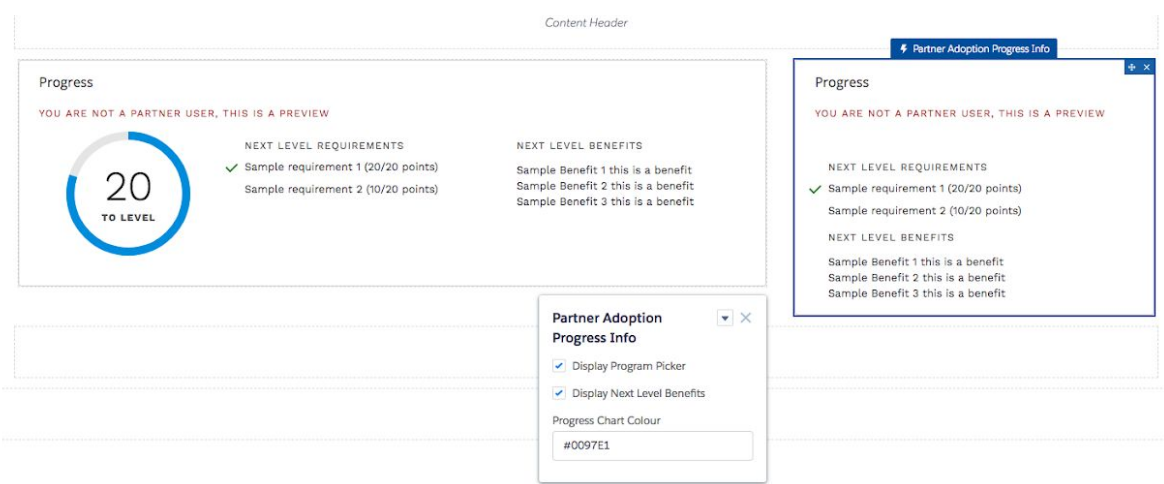


Partner Adoption Progress Info

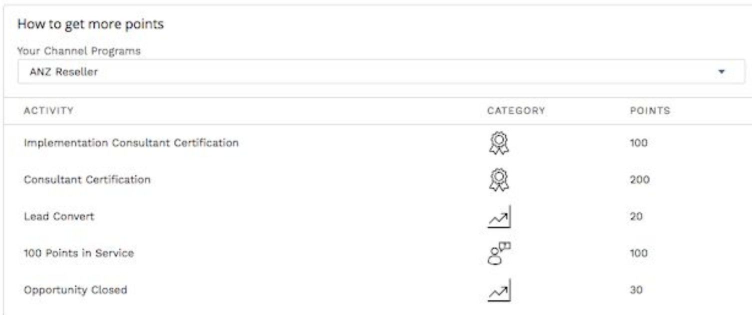


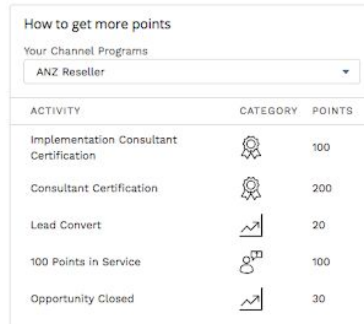


1. Their progression information to next level:
    a. How many points they need to next level
    b. Detailed requirements for the next level (with how the partner is tracked against each requirement)
    c. (Optional) Benefits of the next level
2. Can be configured in Community Builder to:
    a. Not to show the Channel Program picker
    b. Not to display the Next level Benefits
    c. Choose the Progress Chart Colour



Featured activities





1. Featured activities to encourage them getting more points
    a. Displays Partner Activities Types for the current Channel Partner Level which are flagged as “Featured”
    b. Category Icons
    c. Point scores for the activity for the selected Channel Partner Level

There is also a standard component (Record List component) that you can display partner activities to show partner accounts a history of their points. Where Participant is used, activities may also be displays for the partner contacts.

Simply assign the Partner Tiering Information Permission permission set included in this package to your partner users and drag the components you need in your partner community and your partner users will be able to see their information of their level.

Dashboard Permission Gotchas

You can also put the dashboard “Partner Tiering Dashboard for Partner” in community too for your partner users to gain insight of their activities. There are a few gotchas you will need to look out for:

- The dashboard folder will need shared with partner users
- Organization-wide default for Default External Access on all the objects you are reporting on will have to be “Private”. For our case, including:
    - Account
    - Partner Activity Type
    - Partner Level
- For your partner users to see Partner Activities, their own account and partner levels, you will then need to using sharing sets or sharing rules to share these records with them.

Multilingual Environment (Optional)

Component Label Customisation and Translation

Follow these steps if your org uses languages other than English or uses multiple languages based on user's preferences.
Go to Setup | Translation Settings. Enable Translation Workbench and add the language(s) you need.
Create a custom list view for custom labels.

1. Go to Setup | Custom Labels and click "Create New View"
2. Filter by "Short Description" starts with Partner Tier. This will give you a list of custom labels used in the Lightning components in this app.Customize the labels.
3. Click into any label and edit the Value field on the label for the English language.
4. Add more languages to labels for multilingual org environment (Optional).
5. In the label detail page click "New" on the translation list. and then input the proper translation.

Considerations When Using Partner Adoption Management

Consider the following before you install Partner Tiering Management in your org:

- It introduces four new custom objects into your org
- It creates relationships between standard Account object with two of the custom objects
- It creates custom fields on Account
- It creates custom fields on User object to help identifying user's account's context in reports and dashboards

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