Partner Cloud

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Partner Cloud

Start managing the full partner lifecycle in one place with tools built directly into Salesforce. Use Partner Cloud to recruit, onboard, enable, and co-sell with partners while giving them secure access to the data and workflows they need. Bring together key capabilities like deal registration, incentives, training, and performance tracking so your team can scale indirect sales and improve partner relationships. Partner Cloud helps you do more with the partners you already have–faster, and with less manual work.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Sales Cloud Enterprise Edition (or above) with Partner Ecosystem Management (Member or Login), Partner Community, and External Apps licenses.

Partner Cloud includes tools for recruiting, onboarding, enabling, and collaborating with partners, all natively built into Salesforce. It provides secure, customizable partner portals and automation tools to support scalable channel operations.

Find and onboard the right partners - Use CRM data, automation, and referrals to grow your partner network. Run B2B referral campaigns that reward existing partners for bringing in new ones. Build workflows to streamline partner intake and get new partners selling faster.

Guide partners through enablement - Help partners ramp quickly and stay aligned with your sales motion. Use Partner Tracks to guide them through onboarding, learning, and performance milestones using LMS, CMS, and in-app guidance. Track progress and keep partners engaged over time.

Align on strategic accounts - Collaborate with partners on high-value accounts without losing oversight. Use Account Plans with Partners to set shared goals, track objectives, and give partners controlled visibility into strategic accounts. Stay aligned while keeping your data secure.

Support partner-led marketing - Give partners access to co-branded campaigns, content, and tools that drive pipeline. Use Marketing Development Funds (MDFs) and integrations with CMS or TCMA platforms to help partners promote your products in new markets.

Simplify deal and lead collaboration - Make it easy for partners to register deals, accept leads, and keep you updated. Use Partner Connect to sync opportunity and lead data between orgs so both sides can work from the same source of truth with minimal manual effort.

Drive performance with incentives - Motivate partners with flexible incentive tools. Use Channel Revenue Management to manage rebates, pricing programs, and payout rules. Automate commissions with Spiff and reward referrals that grow your ecosystem.

Help partners resolve issues faster - Provide partners with the tools they need to support customers. Use case management, knowledge articles, and bots to handle issues efficiently. Delegate site admin tasks to trusted external users to reduce internal overhead.

Manage the Full Partner Lifecycle with Partner Cloud

Partner Cloud helps companies recruit, enable, collaborate with, support, and incentivize partners in Salesforce. It unifies PEM, PRM, and ChRM to manage the full partner lifecycle with secure access, automation, collaboration, incentives, and analytics for scaling indirect sales.

Partner Cloud Overview

- Understand what Partner Cloud includes
- Learn how Partner Ecosystem Management supports the full partner lifecycle
- Understand when to use Partner Relationship Management
- Understand when to use Channel Revenue Management for incentives and pricing

Design Your Partner Strategy and Architecture

- Identify partner personas, roles, and responsibilities
- Choose the right licenses for partners and channel teams
- Select an Experience Cloud template that supports partner workflows

Set Up Partner Relationship Management (PRM)

- Get started with Partner Relationship Management
- Set up partner users, accounts, and external account hierarchies
- Enable sales features for partners

Enable and Guide Partners

- Deliver onboarding and learning with Partner Enablement
- Guide partners using Partner Tracks and in-app guidance
- Collaborate with partners using PRM for Slack

Sell and Collaborate with Partners

- Register and manage deals as a partner
- Accept and manage leads from vendors
- Collaborate on shared business using Partner Connect
- Use enhanced list views and AI insights
- Track pipeline and activity in

Manage Incentives with Channel Revenue Management

- Understand Channel Revenue Management capabilities
- Set up rebate programs for partners
- Manage ship-and-debit and price protection programs
- Track partner inventory and point-of-sale data

	partner dashboards	
Support Partners with AI and Self-Service Support partners using Partner Success Agent Review considerations before enabling Partner Success Agent Set up Partner Success Agent using Agentforce templates	**Avoid common pitfalls and plan for scale.** Review considerations and limitations for Partner Relationship Management Review considerations for Partner Cloud and PEM Review Experience Cloud considerations for partner sites Review considerations for creating and managing partner users	**Recruit and Grow Your Partner Ecosystem** Recruit partners using referrals and automated onboarding Automate partner referrals using B2B Referral Management flows

Partner Ecosystem Management

Partner Ecosystem Management (PEM) offer a powerful, unified solution for managing your entire partner lifecycle directly within Salesforce. Together, these features eliminate fragmented systems and reduce administrative complexity by consolidating key capabilities–such as onboarding, deal registration, training, and performance tracking–into one scalable platform.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Sales Cloud Enterprise Edition (or above) with Partner Ecosystem Management (Member or Login), Partner Community, and External Apps licenses.

Partner Ecosystem Management User Licenses
Partner Ecosystem Management (PEM) is Salesforce's unified license offering that empowers external partner users with structured access to Salesforce features via Experience Cloud. PEM builds on Partner Relationship Management (PRM) by including key channel management capabilities such as enablement, referrals, incentives, and account planning within a single bundled SKU.

Partner Ecosystem Management User Licenses

Partner Ecosystem Management (PEM) is Salesforce's unified license offering that empowers external partner users with structured access to Salesforce features via Experience Cloud. PEM builds on Partner Relationship Management (PRM) by including key channel management capabilities such as enablement, referrals, incentives, and account planning within a single bundled SKU.

Note PEM is sold as an add-on license. Base org must be on Enterprise Edition or higher.

License Model for PEM

- PEM Member: Named user license with unlimited monthly access. Use when user base is known.
- PEM Login: Daily login-based access. Ideal for dynamic or flexible usage patterns.

Use Cases

License	Best used for
Partner Ecosystem Management (PEM) add-on	B2B use cases requiring integrated enablement, incentives, referrals, and account planning.
Partner Community	B2B experiences that need access to sales data such as partner relationship management. The Partner Community can't be used with person accounts.

Feature Access

Feature	PEM ACCESS
Partner Portal Access	Yes, via Experience Cloud
Account Plans with Partners	Yes (Read); Editable with custom permset
Partner Tracks (Enablement)	Yes
B2B Referral Management	Yes
Partner Relationship Management (PRM)	Yes

Capabilities of PEM

Review the capabilities of the PEM bundle.

Capability	Description
Account Planning	Collaborate with partners on shared strategic account plans, including goals, SWOT analysis, and key metrics.
Partner Enablement	Provide structured learning paths and onboarding tools via Partner Tracks.
B2B Referrals	Enable partners to submit, track, and manage partner and deal registration referrals in one place.
Partner Relationship Management (PRM)	Provide a branded partner portal to manage recruitment, onboarding, enablement, and deal collaboration. PRM streamlines indirect sales with secure access to leads, training, and marketing tools, and supports role-based visibility and customizable workflows.
Spiff (Salesforce Incentive Compensation Management)	Make incentive payouts easy and clear for partners by automating them based on sales activity–build trust, cut down manual work, and help partners stay motivated and close deals faster.

Facilitate Partner Referrals with B2B Referral Management

Amplify your growth targets by empowering partners to refer new business clients. Drive enhanced business referrals with tailored rewards and accelerated program design. Automate the referral journey through intuitive stages and invocable actions. Optimize your sales with comprehensive visibility and seamless tracking across referral programs and promotions.

Account Planning with Partners

Collaborate with partners on strategic customer accounts directly within Salesforce using Account Plans in PRM. Share access to account goals, metrics, and insights to create structured plans that drive growth, strengthen alignment, and build long-term customer value. This feature extends powerful Sales Cloud Account Planning tools to the Partner Community.

Joint Business Plans

Collaborate with partners to align on goals, track progress, and grow your indirect business.

Manage Partner Tracks

Use Partner Tracks to guide your partners through structured enablement programs that align with your business goals.

Manage and Automate Incentive Payouts for Partners

Make incentive payouts easy and clear for partners by automating them based on sales activity–build trust, cut down manual work, and help partners stay motivated and close deals faster.

Cultivate Partner Loyalty with Loyalty Programs

Build lasting relationships with partners by creating compelling loyalty programs. Amplify your growth targets by incentivizing desired behaviors with rewards. Automate the loyalty journey and gain comprehensive visibility into program performance.

B2B Referral Management Flows

B2B Referral Management uses flows to automate the tracking of referrals and rewards throughout the lead and opportunity lifecycles. These flows handle event processing when leads are created or converted and when referred opportunities are won.

Partner Deal Management Flows

Partner Deal Management uses a set of flows to manage the lifecycle of a deal, from the initial registration by a partner to the final approval or rejection by a reviewer. These flows work together to create records, check for duplicates, and manage status updates.

Facilitate Partner Referrals with B2B Referral Management

Amplify your growth targets by empowering partners to refer new business clients. Drive enhanced business referrals with tailored rewards and accelerated program design. Automate the referral journey through intuitive stages and invocable actions. Optimize your sales with comprehensive visibility and seamless tracking across referral programs and promotions.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Sales Cloud Enterprise Edition (or above) with Partner Ecosystem Management (Member or Login), Partner Community, and External Apps licenses.

Enhance your Partner Ecosystem strategy with B2B Referral Management. Create a referral program and design promotions relevant to your company's requirements using an intuitive guided flow. Incentivize advocates and referred parties to participate by offering tailored rewards, such as payout commissions.

Use custom templates to define when to reward partners and referred parties across referral stages. Utilize invocable actions to easily enroll partners as advocates for promotions, track referral activity, and automatically reward advocates and referred parties when they complete eligible activities. Track all updates of the referral program and its promotions, including which stage each referral is at, activities completed by advocates and their referred parties, and whether referral rewards have been issued for eligible activities.

When you use B2B Referral Management provided with the Partner Relationship Management license, note these limitations:

- You can onboard 150 active advocates.
- You can issue up to 10,000 vouchers.

An Advocate must have a Business Account record to join B2B referral promotions and earn referral rewards.

The count of issued vouchers is based on the number of records in the voucher object, without considering the status of each individual voucher.

Active Advocate Count

An active advocate represents a partner's active engagement with an active referral promotion. The active advocate count denotes the number of partners that the brand is actively engaging through their referral promotions.

Salesforce considers an advocate as active only when:

- The promotion that the advocate is a part of is active
- The Loyalty Program Member Promotion record that associates an advocate with a promotion is active.

Example Here are a few examples of how the active advocate count is calculated:

BUSINESS SCENARIO	ACTIVE ADVOCATE COUNT
A company has two active promotions, one is active and another is inactive. The active promotion has 15 active advocates. The inactive promotion has 7 active advocates.	15
A brand has two active promotions. In one promotion, there are 4 active advocates and 1 inactive advocate. The second promotion has 23 active advocates and 17 inactive advocates.	27 (4 plus 23)
A brand has one active promotion and adds 5 partners to the promotion as active advocates when the promotion is launched. After the launch, another 15 partners join as active advocates.	20 (5 plus 15)
A partner joins five promotions, out of which two promotions are now inactive.	3 (5 minus 2)
A brand has 16 advocates who are part of active promotions but 5 of these advocates don't have active Loyalty Program Member Promotion records.	11 (16 minus 5)
A brand has 120 active advocates and is expected to add another 40 advocates in the upcoming year based on the estimates from their planned promotions.	150 (120 plus 30)In this scenario, the brand is expected to have 10 more active advocates for the B2B Referral Management use case than provisioned by the Partner Relationship Management license, so you must decide which 150 advocates will be active.

Account Planning with Partners

Collaborate with partners on strategic customer accounts directly within Salesforce using Account Plans in PRM. Share access to account goals, metrics, and insights to create structured plans that drive growth, strengthen alignment, and build long-term customer value. This feature extends powerful Sales Cloud Account Planning tools to the Partner Community.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Sales Cloud Enterprise Edition (or above) with Partner Ecosystem Management (Member or Login), Partner Community, and External Apps licenses.

Partners can view and contribute to account strategies based on permissions set by vendor teams, making it easier to align on goals and execute collaboratively.

Account Planning in PRM supports a Plan with Partners model where Channel Managers and Partner Reps co-create strategic plans. Partners can contribute insights, map customer needs, and upload supporting documentation based on permission levels.

Setup Account Plans with Partners

Set up account plans with partners to align on shared goals, track strategic initiatives, and drive mutual growth. This helps improve collaboration, visibility, and execution on key customer accounts across internal teams and partner organizations.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Sales Cloud Enterprise Edition (or above) with Partner Ecosystem Management (Member or Login), Partner Community, and External Apps licenses.

USER PERMISSIONS NEEDED	
Create, edit, delete, clone plans; manage sharing; view Relationship Maps.	Channel Manager
View shared plans; edit permitted fields like Customer Landscape, Competitive Landscape,	Partner Admin

USER PERMISSIONS NEEDED	
Objectives and Measures if allowed.	
Enable and configure feature; assign permissions.	Salesforce Admin
Add components to Partner Site.	Partner Admin

Enable Account Plans in Setup

Admins can enable Partner Account Plans as part of the PRM setup.

Make sure that Sales Account Plans is enabled–Partner Account Plans rely on this configuration.

1. Go to **PRM Setup** > **Partner Productivity**>**Account Plans with Partners**.
2. Click through to Sales Account Plans to complete setup
3. Assign permission sets, add Account Plans to page layouts, and customize fields as needed.
4. Add the Account Plan component to the Account Record Page on your Partner Community site.

Account Plan component is available only on the `Account` object. Partner layout may differ from vendor layout but fields remain consistent with the vendor configuration.

Joint Business Plans

Collaborate with partners to align on goals, track progress, and grow your indirect business.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Partner Ecosystem Management - Members or Partner Ecosystem Management - Login

Joint Business Plans help you and your partners define a shared strategy for a planning period–usually quarterly, semi-annual, or annual. Use a joint business plan to agree on growth targets, outline sales and marketing priorities, monitor key performance indicators (KPIs), and track actions across both teams.

Joint Business Plans are available only for Partner Accounts and are designed for vendors, channel managers, and partner reps who need a structured way to plan, execute, and measure joint business growth.

Who uses Joint Busines Plans
Joint Business Plans bring internal teams and external partners together to drive growth.

What Can you do with Joint Business Plans
Joint Business Plans provide a workspace where channel managers and partners can set a shared strategy, create measurable objectives, build action plans, and collaborate with partners.

Set Up Joint Business Plans
Before channel managers can create joint business plans, admins must complete a few steps.

Who uses Joint Busines Plans

Joint Business Plans bring internal teams and external partners together to drive growth.

Admins - Admins lay the groundwork for success. They enable Joint Business Plans, configure partner-led opportunity rules, and customize fields and page layouts. They also establish the metrics for success by setting up objective measures and action plan templates.

Channel Managers - Channel Managers orchestrate the strategy. They create and update the actual plans, defining clear objectives and KPIs. They play a vital collaborative role by assigning specific action plans and sharing the roadmap directly with partners to ensure alignment.

Partner Users - Partner Users execute the vision. Logging in through Partner Central, they gain visibility into shared plans, track their performance against objectives, and complete the specific tasks and action items assigned to them.

What Can you do with Joint Business Plans

Joint Business Plans provide a workspace where channel managers and partners can set a shared strategy, create measurable objectives, build action plans, and collaborate with partners.

Set a Shared Strategy

- Define account vision, strategic priorities, and go-to-market focus areas.
- Identify enablement needs, marketing efforts, and co-selling motions.

Create Measurable Objectives - track KPIs across partner-specific entities such as:

- Partner-led opportunities
- Market Development Funds (MDF)
- Enablement programs
- Deal registrations
- Loyalty and referrals

Note Sales Pipeline Value, MDF Claimed, and Enablement Programs Completed are some of the out-of-the-box measures that you can customize.

Build Action Plans - Assign tasks and activities that help both teams stay aligned, such as:

- Co-selling targets ,
- Certification and enablement milestones,
- MDF execution steps .
- Lead follow-up, and deal registration goals

Collaborate with Partners - Partners can view (and optionally edit) the joint account plans in Partner Central using standard permission sets.

Set Up Joint Business Plans

Before channel managers can create joint business plans, admins must complete a few steps.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Partner Ecosystem Management - Members or Partner Ecosystem Management - Login

USER PERMISSIONS NEEDED	
Create, edit, delete, clone plans; manage sharing; view Relationship Maps.	Channel Manager
View shared plans; edit permitted fields like Customer Landscape, Competitive Landscape, Objectives and Measures if allowed.	Partner Admin
Enable and configure feature; assign permissions.	Salesforce Admin
Add components to Partner Site.	Partner Admin

Enable Joint Account Plans

Joint Account Plans require Sales Account Plans to be enabled first.

After activation, Joint Account Plans appear automatically on Partner Accounts.

Configure Account Page Layout

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1. From **Setup**, click the **Object Manager** tab.
2. Select **Account** from the list of objects.
3. Click **Page Layouts** in the left sidebar.
4. Click the name of the layout you want to edit (e.g., "Account Layout") or select **Edit** from the dropdown menu next to it.
   a. Add elements: In the palette at the top, select a category (e.g., Fields, Buttons, Related Lists) and drag the desired element onto the layout below.
   b. Remove elements: Drag any unwanted element from the layout back up to the palette.

   c. Reorder elements: Click and drag fields, sections, or related lists to move them to a new location.
5. Configure properties: Click the wrench icon next to a field to make it "Read-Only" or "Required," or next to a Related List to customize its columns.
6. Click **Save** in the palette header to apply your changes..

Set up Partner Central Access

Setting up partner central access involved enabling Digital Experiences, creating a new Community site using the Partner Central template, configuring profiles/permission sets (like cloning the standard Partner Community User), adding partner users to accounts/contacts, and customizing the builder for partner-specific needs like lead sharing or deal registration

Define Objective Measure Calculations

Objective Measure Calculations (within Account Plans) define how to automatically compute a metric (like total Opportunity amount or count) from related records (Opportunities, Campaigns, Cases) to track progress against strategic goals.

Configure Action Plan Template for an Objective

1. Create action plan templates.
2. Add to Page Layout via Setup > Object Manager, select your target object (e.g., Opportunity). Edit the Page Layout and drag the Action Plans Related List onto the layout.
3. Use the Lightning App Builder to add the Action Plans List component to relevant record pages (e.g., Account/Opportunity pages).
4. Grant users the necessary permissions for Action Plans and Action Plan Templates via Permission Sets or Profiles.

Important The feature distinguishes between customer accounts (Account Plans) and partner accounts (Joint Business Plans) automatically.

Manage Partner Tracks

Use Partner Tracks to guide your partners through structured enablement programs that align with your business goals.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Sales Cloud Enterprise Edition (or above) with Partner Ecosystem Management (Member or Login), Partner Community, and External Apps licenses.

Provide training, resources, and certifications that help partners effectively sell and support Salesforce products. Drive faster onboarding, improve partner performance, and maintain consistency across your ecosystem. Deliver enablement directly through the Partner Community, ensuring easy access and measurable outcomes. See Manage Partner Enablement Programs

Manage and Automate Incentive Payouts for Partners

Make incentive payouts easy and clear for partners by automating them based on sales activity–build trust, cut down manual work, and help partners stay motivated and close deals faster.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Sales Cloud Enterprise Edition (or above) with PEM, Partner Community, and External Apps licenses.

Spiff provides visibility to partners on their incentive payouts by automating incentive payouts based on predefined sales behaviors, improving motivation and performance. For partner ecosystem management, it streamlines the tracking, calculation, and distribution of incentives, reducing manual effort and errors. See Incentive Compensation Management

Cultivate Partner Loyalty with Loyalty Programs

Build lasting relationships with partners by creating compelling loyalty programs. Amplify your growth targets by incentivizing desired behaviors with rewards. Automate the loyalty journey and gain comprehensive visibility into program performance.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Sales Cloud Enterprise Edition (or above) with PEM, Partner Community, and External Apps licenses.

Transform your partner relationships by using Loyalty Management. Create a loyalty program and design promotions relevant to your company's requirements using a simplified guided flow. Add partners as corporate members to your loyalty programs.

Create a tier group to define tiers and the associated tier model for member recognition. Within this tier group, create multiple tiers to categorize members based on their loyalty activities. As members engage more with the program, they're recognized to higher tiers and get more exclusive benefits. Incentivize partners to participate with tailored rewards, including vouchers and static benefits.

Define a currency to measure and reward member engagement and purchases. You can define either a qualifying or a non-qualifying currency. Qualifying currency is associated with a tier group and is used for member tier evaluation. Non-qualifying currency refers to the points that the member earns for redemption.

Easily automate loyalty processes and track members, points, tiers, and vouchers. See Admin and Developer Resources with Loyalty Management.

When you use Loyalty Management Lite provided with Partner Ecosystem Management, note these limitations:

- You can issue up to 10,000 vouchers.

The count of issued vouchers is based on the number of records in the voucher object, without considering the status of each voucher.

- You can create and process up to 10,000 events.

The count of events is based on the number of records in the transaction journal object. See Feature Availability with Loyalty Management Licenses

B2B Referral Management Flows

B2B Referral Management uses flows to automate the tracking of referrals and rewards throughout the lead and opportunity lifecycles. These flows handle event processing when leads are created or converted and when referred opportunities are won.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Sales Cloud Enterprise Edition (or above) with Partner Ecosystem Management (Member or Login), Partner Community, and External Apps licenses.

The following flows are included for B2B Referral Management:

- **Process Opportunity Won Referral Event:** Updates referral and reward records when an opportunity is closed as won.
- **Process Partner Referral Code:** Processes referral codes for new or converted leads.

Process Opportunity Won Referral Event

The Process Opportunity Won Referral Event flow (API Name: `partner_b2brfrmgt__ProcOpptyWonRefEvt`) triggers when an Opportunity record is created or updated. It calls an invocable action to create and update referral and reward records when a referred Opportunity is won.

Element Label	API Name	Description
Process B2B Closure Event	ProcessB2BClosureEvent	Action element. Processes a B2B referral event of type Closure by calling an action and passing in the referral code, account ID, current date and time from the triggering Opportunity record.
Get Referral Record	GetReferralRecord	Get Records element. Gets the referral record with an OpportunityId that matches the ID of the triggering opportunity.
Update Extended Reward	UpdateExtendedReward	Update Records element. Updates the Extended Reward record with an AccountId that matches the ReferrerId of the Referral from the GetReferralRecord record variable.

Process Partner Referral Code

The Process Partner Referral Code flow (API Name: `partner_b2brfrmgt__ProcPartnerRefCode`) processes the referral code for lead records with a Lead Source of Partner when they are created or updated.

Element Label	API Name	Description
Check Lead Status	LeadStatusCheck	Decision element. Evaluates whether the Lead is New or Converted and directs it to the appropriate path.
Process B2B Converted Event	ProcessB2BConvertedEvent	Action element. Uses values from earlier in the flow to set the inputs for the "Process B2B Referral Event" core action.
Process B2B Referral Event	ProcessB2BReferralEvent	Action element. Sets the inputs for the "Process B2B Referral Event" core action using values

		from earlier in the flow.

Partner Deal Management Flows

Partner Deal Management uses a set of flows to manage the lifecycle of a deal, from the initial registration by a partner to the final approval or rejection by a reviewer. These flows work together to create records, check for duplicates, and manage status updates.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Sales Cloud Enterprise Edition (or above) with Partner Ecosystem Management (Member or Login), Partner Community, and External Apps licenses.

Partner Deal Management package includes these flows:

- Register Deal: Helps a partner to register a new deal.
- Deal Approval: Manages the approval process for the registered deal.
- Find Duplicate Leads: Checks for existing duplicate leads.
- Review Deal Request: Provides a page for reviewers to approve or reject a deal.
- Update Deal Status: Updates the status of the lead record.

Register Deal Flow
The Register Deal flow (API Name: *partner_deal_rgstr__RegisterDeal*) guides the user through registering a new Lead for a deal. It collects company and contact details, retrieves the necessary business processes and record types, and creates the lead record.

Deal Approval Flow
The Deal Approval flow (API Name: *partner_deal_rgstr__DealApproval*) identifies duplicate leads and notifies the appropriate group or account owner for approval. The reviewer approves or rejects the lead, updating the associated record.

Support Flows
These autolaunched and screen flows support the main registration and approval processes.

Register Deal Flow

The Register Deal flow (API Name: *partner_deal_rgstr__RegisterDeal*) guides the user through registering a new Lead for a deal. It collects company and contact details, retrieves the necessary business processes and record types, and creates the lead record.

The flow includes the following key elements:

Element Label	API Name	Description

Collect Lead Details	CollectLeadDetails	Screen element. Collects company and contact information for the new lead record.
Get Business Process Record	GetBusinessProcessRecord	Retrieves one active business process record for the lead record with the Name field value that matches the DealRegistrationName constant.
Get Lead Record Type Record	GetLeadRecordTypeRecord	Retrieves one active Record Type record for the Lead object that is associated with the business process ID and matches the DealRegistrationName constant.
Create Lead Record	CreateLeadRecord	Creates one Lead record using data from the Collect Lead Details screen. Sets the Lead Source field to 'Partner', and sets the Status field to the value of the LeadStatus variable.
Deal Submission Confirmation	DealSubmissionConfirmation	Screen element. Displays a confirmation message after successfully creating the Lead record.
Lead Submission Error	LeadSubmissionError	Screen element. Displays an error message if the Lead record creation fails.

Deal Approval Flow

The Deal Approval flow (API Name: *partner_deal_rgstr__DealApproval*) identifies duplicate leads and notifies the appropriate group or account owner for approval. The reviewer approves or rejects the lead, updating the associated record.

The flow includes the following key elements:

Element Label	API Name	Description
Mark Lead Submitted	MarkLeadSubmitted	Calls an action that updates the Status field of the lead that triggered the flow to the SubmittedLeadStatus constant.

Find Duplicate Leads	FindDuplicateLeads	Calls an action to find duplicate leads for the record that was passed into the flow.
Has Duplicate Deals?	HasDuplicateDeals	Decision element. Determines whether the duplicate count returned by Find Duplicate Leads is greater than zero.
Primary Group Approval	PrimaryGroupApproval	Calls an approval action for the primary group.
Secondary Group Approval	SecondaryGroupApproval	Calls an approval action for the secondary group.
Is Lead Status Submitted?	IsLeadStatusSubmitted	Decision element. Determines whether the Status field of the record that triggered the flow matches the SubmittedLeadStatus constant.
Mark Lead Approved	UpdateLeadStatusToApproved	Calls an action that updates the Status field of the lead that triggered the flow to the ApprovedLeadStatus constant.
Mark Lead Rejected	UpdateStatusToRejected	Calls an action that updates the Status field of the lead that triggered the flow to the RejectedLeadStatus constant.

Support Flows

These autolaunched and screen flows support the main registration and approval processes.

Find Duplicate Leads

The Find Duplicate Leads flow (API Name: *partner_deal_rgstr__FindDuplicateLeads*) finds the number of duplicate lead records for a specified lead.

Element Label	API Name	Description
Find Duplicates for Lead	FindDuplicatesForLead	Calls an action that finds duplicate lead records for the record ID stored in leadId.
leadId	leadId	Variable. Stores the ID of the

		lead record for which duplicates need to be found.
	duplicateCount	Variable. Stores the number of duplicate lead records found and is available as output from the flow.

Review Deal Request

The Review Deal Request flow (API Name: *partner_deal_rgstr__ReviewDeal*) reviews an approval request for a deal. It is used as a subflow or screen action to allow a reviewer to make a decision.

Element Label	API Name	Description
Review Approval Request	ReviewApprovalRequest	Screen element. Displays the option to approve or reject an approval request.
approvalDecision	approvalDecision	Variable. Stores the value of the approval decision selected by the reviewer, which is available as output from the flow.

Update Deal Status

The Update Deal Status flow (API Name: partner_deal_rgstr__UpdateDealStatus) updates the status field on a specified Lead record.

Element Label	API Name	Description
Update Lead Status	UpdateLeadStatus	Updates the Status field of the lead record with an ID that matches the value of leadId to the value in the leadStatus variable.
leadId	leadId	Variable. Stores the ID of the lead record to update and is passed into the flow.
leadStatus	leadStatus	Variable. Stores the value for the Status field that is passed into the flow.

Channel Revenue Management

Channel Revenue Management is a suite of robust features built on the Salesforce Platform that help your business elevate channel partner engagement, track channel inventory, and drive channel sales with incentives. It's a unified suite that helps you manage channel partner operations, protect margins, report market opportunities, and strengthen partner collaboration and trust.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Sales Cloud Enterprise Edition (or above) with PEM, Partner Community, and External Apps licenses.

Improve access to market opportunities and resolve channel conflicts by using Design Registration. Improve partner inventory visibility to reduce overpayments and revenue leakages by using Channel Partner Inventory Tracking. Establish and manage transparent and collaborative relationships with your partners by using Price Protection. Incentivize your partners to meet targets with volume, growth, and other types of rebates by using Rebate Management. Compensate partners for competitive product pricing by using Ship and Debit Process Management.

See Channel Revenue Management

Partner Relationship Management

Maximize channel sales, partner productivity, and collaboration, by delivering a modern, personalized partner experience with Partner Relationship Management (PRM). Get features that help channel managers and partners work together efficiently.

REQUIRED EDITIONS

Available for channel managers in Salesforce Classic and Lightning Experience in **Enterprise**, **Performance**, **Unlimited**, **Developer** Editions with Sales Cloud or Service Cloud. You must have at least one PRM add-on license.
Available for partners in supported Experience Cloud sites, accessed through Lightning Experience in **Enterprise**, **Performance**, **Unlimited**, **Developer** Editions with Sales Cloud or Service Cloud. A PRM add-on license is required for each partner user.

See Partner Relationship Management

Partner Cloud

Partner Success Agent delivers AI-powered, personalized support for partners. It helps partners resolve issues quickly, access enablement resources, and receive contextual recommendations. With vendor-specific customization, seamless case handoff, and quick setup, Partner Success Agent drives partner engagement, productivity, and ecosystem growth.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Required add-on licenses vary by agent type.

Considerations for Partner Success Agent

Before setting up the Partner Success Agent, consider supported functionality, usage, limitations and allowances, limits, and other issues.

All the considerations for Agentforce Service Agent apply to the Partner Success Agent.

Other Considerations

- Do not create or update records when the org is in maintenance mode or read-only database mode. Be aware that Partner Success Agents may currently bypass this restriction due to a known issue. A fix is in progress to align behavior with the expected limitation.
- Adaptive Response for Agent is enabled by default for all newly created Partner Success Agents. When active, it overwrites the UI for messages inside MIAW Chat components, which may prevent partners from experiencing the intended behavior. To address this, admins should turn off Adaptive Response before activating the agent. If the agent has already been activated, admins can deactivate it first, then disable Adaptive Response.
- Enforce Trusted URLs.

Set up Partner Success Agent

Use the default Agentforce Service Agent template to create the Partner Success Agent designed to resolve common support cases and requests.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Partner Ecosystem Management (PEM) add-on and Agentforce for Service add-on.

Create a Partner Success Agent

REQUIRED EDITIONS

USER PERMISSIONS NEEDED	
To build and manage Service Agents:	Manage Agentforce Service Agents AND Manage AI Agents

USER PERMISSIONS NEEDED	
	OR Customize Application

1. Create the Partner Success Agent using the Agentforce Service Agent template.
2. Choose a data source for the partners to use the Partner FAQ topic.

Create Data Library for Partner FAQ

Summary of the configuration steps required to make the Partner FAQ topic work with the partner context in the authentication-based MIAW setup.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Partner Ecosystem Management (PEM) add-on and Agentforce for Service add-on.

The Agentforce Data Library (ADL) supports the following data types:

- Files
- Knowledge
- Web
- Custom Retriever

Configure Files with ADL

1. Create a Data Library with Files as the data type in a data space.
2. Upload the required documents.
3. Enable the Show Sources checkbox if the agent's response should include the **Source** information.

Authentication Scenarios:

- **Unauthenticated:** Utterances work fine without changes.
- **Authenticated:** Provide the partner user with access to the dataspace by adding it to the **Agentforce for Partners** permission set.

Configure Knowledge with ADL

1. Create a Data Library with Knowledge as the data type that references Salesforce Knowledge Articles.
2. Enable the Show sources checkbox if the agent's response should include **Sources** information.

Note Partner users will only be able to query articles they have access to, even if the retriever is created for the entire Knowledge Library.

Unauthenticated Scenario Requirements:

- Add the following access and permissions to the **Einstein Service Agent user** associated with the agent:
  - Read access on the **Knowledge** object.
  - Enable **Field-Level Security (FLS)** on all fields selected in Agentforce Data Libraries.
  - Allow **View Knowledge**.
- Create a **Custom Permission Set** and assign the above permissions.

Authenticated Scenario Requirements:

- Provide partner user:
  - Read access on the **Knowledge** object.
  - Enable FLS on all fields selected in Agentforce Data Libraries.
- Update **sharing settings** for the Knowledge object to **Public Read Only** for **Default External Access**.
- Enable **Topics for Objects** on the Knowledge object (Setup → Search for *Topics for Objects*).
- Update the **Visible to Partner** field to `true` for relevant Knowledge Articles.
- Optionally add to data categories for more granular access control.

Configure Web Search with ADL

There are two ways to configure web search with ADL

1. Create a Data Library with Web as the Data Type
   a. Create a new library, select **Web** as the data type.
   b. Enable Show sources if citations should be included.
2. Use the Recommended General Web Search Topic
   a. Salesforce suggests creating a General Web Search topic.
   b. This provides more granular control and web-specific configuration options.

Configure a Custom Retriever with ADL

There are two ways to configure web search with ADL

1. Create a Data Library with Custom Retriever as the data type.
2. Specify the Retriever ID.
3. Enable Show sources if citations should be included.

Only active retrievers are available for selection.

Retrievers may be linked to Files, Knowledge, or Web data libraries.

Once selected, the retriever should fetch data from the designated data type.

Partner Case Management

Use the Partner Case Management topic to handle partner inquiries and actions related to support cases, including providing case information, updating existing cases, and creating new cases.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Partner Ecosystem Management (PEM) add-on and Agentforce for Service add-on.

Topic Details

API Name	PartnerCaseManagement
Included Agent Actions	Create Case With Enhanced Data Get Cases For Verified Contact Get Case By Verified Case Number Add Case Comment

Partner Cloud | Create Case
Creates a detailed support case with a structured summary, relevant conversation history, and a linked chat transcript when triggered from supported messaging channels. This context helps agents resolve issues efficiently and avoid repeated interactions.

Partner Cloud | Get Case For Verified Contact
Returns a list of cases related to a given verified contact ID.

Partner Cloud | Get Case by Verified Case Number
Returns a case associated with a given verified contact ID and case number.

Partner Cloud | Add Case Comment
This action lets a customer add a comment to a case.

Partner Cloud | Create Case

Creates a detailed support case with a structured summary, relevant conversation history, and a linked chat transcript when triggered from supported messaging channels. This context helps agents resolve issues efficiently and avoid repeated interactions.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Einstein Platform add-on or Agentforce for Service add-on

USER PERMISSIONS NEEDED	
To build and manage Service Agents:	Manage Agentforce Service Agents AND Manage AI Agents OR Customize Application

Action Details

API Name	CreateCaseEnhancedData
Reference Action Type	Flow
Reference Action	Create Case with Enhanced Data
Inputs	verifiedCustomerID, messagingSessionID, caseSubject, caseDescription
Outputs	caseRecord
Does this action execute one or more prompt templates?	Yes

Examples of Utterances that Trigger this Action

- Can you create a case for me?
- I want to talk to the Channel Manager.
- Create a case for me, for this issue.
- I need help in fixing this issue.
- Please create a case for this issue.
- Please route me to a live agent / channel manager for this issue.
- Create a case for my issue where “My dashboard is not updated".
- I want you to create a case for the issue above mentioned.

Partner Cloud | Get Case For Verified Contact

Returns a list of cases related to a given verified contact ID.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Einstein Platform add-on or Agentforce for Service add-on

USER PERMISSIONS NEEDED	
To build and manage Service Agents:	Manage Agentforce Service Agents AND Manage AI Agents OR Customize Application

Action Details

API Name	GetCasesForVerifiedContact
Reference Action Type	Flow
Reference Action	Get Cases For Verified Contact
Inputs	verifiedContactID
Outputs	caseList
Does this action execute one or more prompt templates?	Yes

Examples of Utterances that Trigger this Action

- Get my cases.
- What is the status of my recent cases?
- What are the cases which I have submitted?

Partner Cloud | Get Case by Verified Case Number

Returns a case associated with a given verified contact ID and case number.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Einstein Platform add-on or Agentforce for Service add-on

USER PERMISSIONS NEEDED	
To build and manage Service Agents:	Manage Agentforce Service Agents AND Manage AI Agents OR Customize Application

Action Details

API Name	GetCaseByVerifiedCaseNumber
Reference Action Type	Flow
Reference Action	Get Case By Verified Case Number
Inputs	verifiedContactID, caseNumber
Outputs	caseRecord
Does this action execute one or more prompt templates?	Yes

Examples of Utterances that Trigger this Action

- Get me the details for the case number 00100567.
- What is the status of case with case number 00088323.
- Please provide me the details of case number 00892382.

Partner Cloud | Add Case Comment

This action lets a customer add a comment to a case.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Einstein Platform add-on or Agentforce for Service add-on

USER PERMISSIONS NEEDED	
To build and manage Service Agents:	Manage Agentforce Service Agents AND Manage AI Agents

USER PERMISSIONS NEEDED	
	OR Customize Application

Action Details

API Name	AddCaseComment
Reference Action Type	Flow
Reference Action	Add Case Comment
Inputs	verifiedContactID, caseNumber
Outputs	caseRecord
Does this action execute one or more prompt templates?	Yes

Examples of Utterances that Trigger this Action

- Add a case comment to this case.
- Add a comment to the case “<case comment>”
- Add a case comment to this case 1232313

Partner FAQ

Use this topic to search knowledge articles to answer partner questions about the company, its products, policies, or business procedures, and provide relevant information from those articles.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Einstein Platform add-on or Agentforce for Service add-on

USER PERMISSIONS NEEDED	
To build and manage Service Agents:	Manage Agentforce Service Agents AND Manage AI Agents

USER PERMISSIONS NEEDED	
	OR Customize Application

Topic Details

API Name	PartnerFAQ
Included Agent Actions	Answer Questions with Knowledge

Partner Cloud | Answer Questions with Knowledge
This action lets a customer add a comment to a case.

Partner Cloud | Answer Questions with Knowledge

This action lets a customer add a comment to a case.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Einstein Platform add-on or Agentforce for Service add-on

USER PERMISSIONS NEEDED	
To build and manage Service Agents:	Manage Agentforce Service Agents AND Manage AI Agents OR Customize Application

Action Details

API Name	AnswerQuestionsWithKnowledge
Reference Action Type	Standard Invocable Action
Reference Action	Answer Questions With Knowledge
Inputs	Query, citationsUrl, ragFeatureConfigId,

	citationsEnabled, mode, retrieverMode
Outputs	knowledgeSummary, citationSources ca
Does this action execute one or more prompt templates?	Yes

Examples of Utterances that Trigger this Action

- Is there any guidance on how to effectively troubleshoot common technical issues?
- What is a processing fee?

Partner Enablement Management

Use this topic to help partners find and enroll in enablement programs by providing recommendations based on their role, experience level, and learning needs, with a focus on training tracks and learning paths that align with their goals.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Einstein Platform add-on or Agentforce for Service add-on

Topic Details

API Name	PartnerEnablementManagement
Included Agent Actions	Recommend Partner Enablement Programs

Partner Cloud | Recommend Partner Enablement Programs
Returns a list of recommended enablement programs for partners.

Partner Cloud | Recommend Partner Enablement Programs

Returns a list of recommended enablement programs for partners.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Einstein Platform add-on or Agentforce for Service add-on

USER PERMISSIONS NEEDED	
To build and manage Service Agents:	Manage Agentforce Service Agents AND Manage AI Agents OR Customize Application

Action Details

API Name	RecPartnerEnablementPrograms
Reference Action Type	Invocable action
Reference Action	Recommend Partner Enablement Programs
Inputs	keywordPhrases, ExperienceCloudSiteID
Outputs	PartnerEnablementPrograms
Does this action execute one or more prompt templates?	Yes

Examples of Utterances that Trigger this Action

- What enablement programs are available to help partners sell more effectively?
- Can you suggest training for managing partner accounts?
- I need resources to improve collaboration with customers as a partner.
- Are there enablement tracks for partner marketing roles?
- Where can I find training on supporting customers as a partner?

Partner Product Pricing

Use this topic to help partners address and resolve queries related to obtaining specific product pricing information and requesting detailed price comparisons across products.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Einstein Platform add-on or Agentforce for Service add-on

Topic Details

API Name	PartnerProductPricing
Included Agent Actions	IdentifyRecordsForProductPricebook GetProductPricingForPartner

Important This topic is automatically added to all the new Partner Success Agents. If you are updating an existing agent, you will have to manually add this topic.

Partner Cloud | Identify Records for Product and Pricebook
Searches for Salesforce records by product name and returns a list of matching record IDs.

Partner Cloud | Get Product Pricing For Partner
Retrieves pricing information or generates a deal estimate for a specified product.

Partner Cloud | Identify Records for Product and Pricebook

Searches for Salesforce records by product name and returns a list of matching record IDs.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Einstein Platform add-on or Agentforce for Service add-on

USER PERMISSIONS NEEDED	
To build and manage Service Agents:	Manage Agentforce Service Agents AND Manage AI Agents OR Customize Application

Action Details

API Name	IdentifyRecordsForProductPricebook
Reference Action Type	Invocable Action
Reference Action	Identify Records for Product and Pricebook

Inputs	recordName, objectApiName
Outputs	searchResults
Does this action execute one or more prompt templates?	Yes

Examples of Utterances that Trigger this Action

- Get me price of product X.
- Get me price of product x from y price book
- Compare price of product X and Y
- Get price history for product x

Partner Cloud | Get Product Pricing For Partner

Retrieves pricing information or generates a deal estimate for a specified product.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Einstein Platform add-on or Agentforce for Service add-on

USER PERMISSIONS NEEDED	
To build and manage Service Agents:	Manage Agentforce Service Agents AND Manage AI Agents OR Customize Application

Action Details

API Name	GetProductPricingForPartner
Reference Action Type	Invocable Action
Reference Action	Get Product Pricing For Partner
Inputs	productID, priceBookID, quantity
Outputs	pricingData

Does this action execute one or more prompt templates?	Yes

Examples of Utterances that Trigger this Action

- Get me price of product X.
- Get me price of product x from y price book
- Compare price of product X and Y
- Get price history for product x