Salesforce PRM (Partner Relationship Management) - Interview Guide & Mastery Handbook

# 📚 Overview

Salesforce PRM enables companies to manage their indirect sales channels such as resellers, distributors, agents, or partners through a branded Experience Cloud site. PRM improves collaboration, lead management, onboarding, training, and partner performance tracking.

# 🔹 Key PRM Concepts & Definitions

Partner Account: A Business Account that is enabled as a partner organization.

Partner\_Type\_Product\_Partnerships\_\_c=Distributor

Type = Distributor

Partner User: A user under a Partner Account accessing the PRM portal.

Partner Role: Assigned via role hierarchy to enable record sharing (e.g., Partner Executive > Partner Manager > Partner User).

Partner Profile: Salesforce Profile tailored for partner access, with specific object permissions (usually paired with Partner Community License).

Role NosNia Tech Pvt. Ltd. Partner User

User License Partner Community

Profile BMG Tech Partner

Deal Registration: Mechanism for partners to register a potential sale and gain visibility/protection on the opportunity.

Lead Distribution: Internal users assign leads to partners for follow-up. Done via manual assignment, queues, or automated flows.

MDF (Marketing Development Funds): Funds granted to partners by vendors to support co-marketing activities. Partners request, track usage, and submit proof of execution.

# 🌟 Interview Questions & Answers

(See full document for question and answer format.)

# 🏢 Technical Implementation Tips

(See full document for partner roles, profiles, sharing, and automation logic.)

# 🧭 Exploring PRM in a Production Org

1. Partner Role Hierarchy: Check Setup > Roles and ensure each Partner Account has a unique hierarchy.

2. Partner User Creation: Check Contacts > Enable Partner User. Verify Profile and License.

3. Data Access Controls: Ensure OWD is Private. Check Sharing Rules and Sets. Use debug logs for Apex sharing.

4. PRM Functionality Setup: Inspect Experience Cloud > Site details for partner branding and modules.

# 📈 Reports & Dashboards

Partner Performance by Tier, Deal Reg Win Rate, Lead Conversion by Partner, MDF Usage and ROI, Partner Onboarding Funnel

# 🏆 Learning Path

Trailhead modules, hands-on practice, and AppExchange exploration.

# 🏑 Hands-on Project Ideas

PRM Portal, Scorecard Dashboard, Lead Assignment Engine, MDF Workflow

# 💼 Resume Tip

Implemented Salesforce PRM for multi-tier partner channels including deal registration, MDF management, onboarding, and dashboards.

# 🧪 Mock Interview Case Study

Scenario involving PRM rollout for industrial equipment vendors with Distributor/Reseller structure.

# 📋 Project Blueprint

Phase-wise plan from Discovery to Deployment for a PRM implementation.

Muneesh Notes

**What** : Enable reseller partners to use PRM for submitting a lead registration

**Expected Outcome :**

Leads can be assigned to a reseller partner . Reseller partner may accept it and submit assigned lead as Deal registration or create a new lead and submit that as deal registration .

1. Partner user should be able to register a deal via PRM. Following will happen when a partner creates lead registration
   1. Partner user will be required to fill mandatory fields and submit for lead registration. [https://docs.google.com/spreadsheets/d/1aBJMEPZi3n0ym4T\_Nj0k8cxy\_qCWapH0fAtbirXFJak/edit#gid=0](https://l.facebook.com/l.php?u=https%3A%2F%2Fdocs.google.com%2Fspreadsheets%2Fd%2F1aBJMEPZi3n0ym4T_Nj0k8cxy_qCWapH0fAtbirXFJak%2Fedit%23gid%3D0&h=AT1rXNxs-JYYKSLuiZu7B4FGjCb9eQ35DNx_Q5t0OImRSYSVOxmQEI3gc4ieMIo13_eM7ForlBJ5IfQ00gv3kBCkWd7FABswM2dfMpTV5bne4eFLkIFl9TNnYBwnba9eaTCMWEG5IzuKTJO2xDc)
   2. Reseller partner should be able to select multiple product while registering a deal . They should be able to add product even after lead is created.
   3. Once a lead is submitted , following submission action will happen
      1. System will submit lead for approval . Deal Desk users (predefined set of users for all partners) will get an email notification for lead reg submission.
      2. System will capture lead reg date/time.
      3. Partner user will be the lead owner.
      4. Lead record will be locked for partner user to make any change.
   4. Deal desk will review the lead to either approve or reject a lead reg.
   5. Approval Action :
      1. Send an email notification to Partner user for deal reg approval.
      2. Capture Deal reg Action Date/time
      3. Unlock record.
      4. Internal user will manually convert lead reg to an account , contact and opportunity . There is an auto-conversion logic in place but will suggest to use that in next phase.
   6. Rejection action : If a deal desk user wants to reject a lead reg , Partner user will get rejection email notification .
   7. Partner users should be able to see leads within their partner account.
2. Once a lead is approved , Deal desk user will be converting lead into an opportunity . Following values should relay into opportunity, account and Contact fields
   1. Account
   2. Contact
   3. Opportunity . e.g.Partner Account , Stage = Align , Close date = Today+ 180 days.

