PARTNER MANAGEMENT USER GUIDE

JUNE 2020

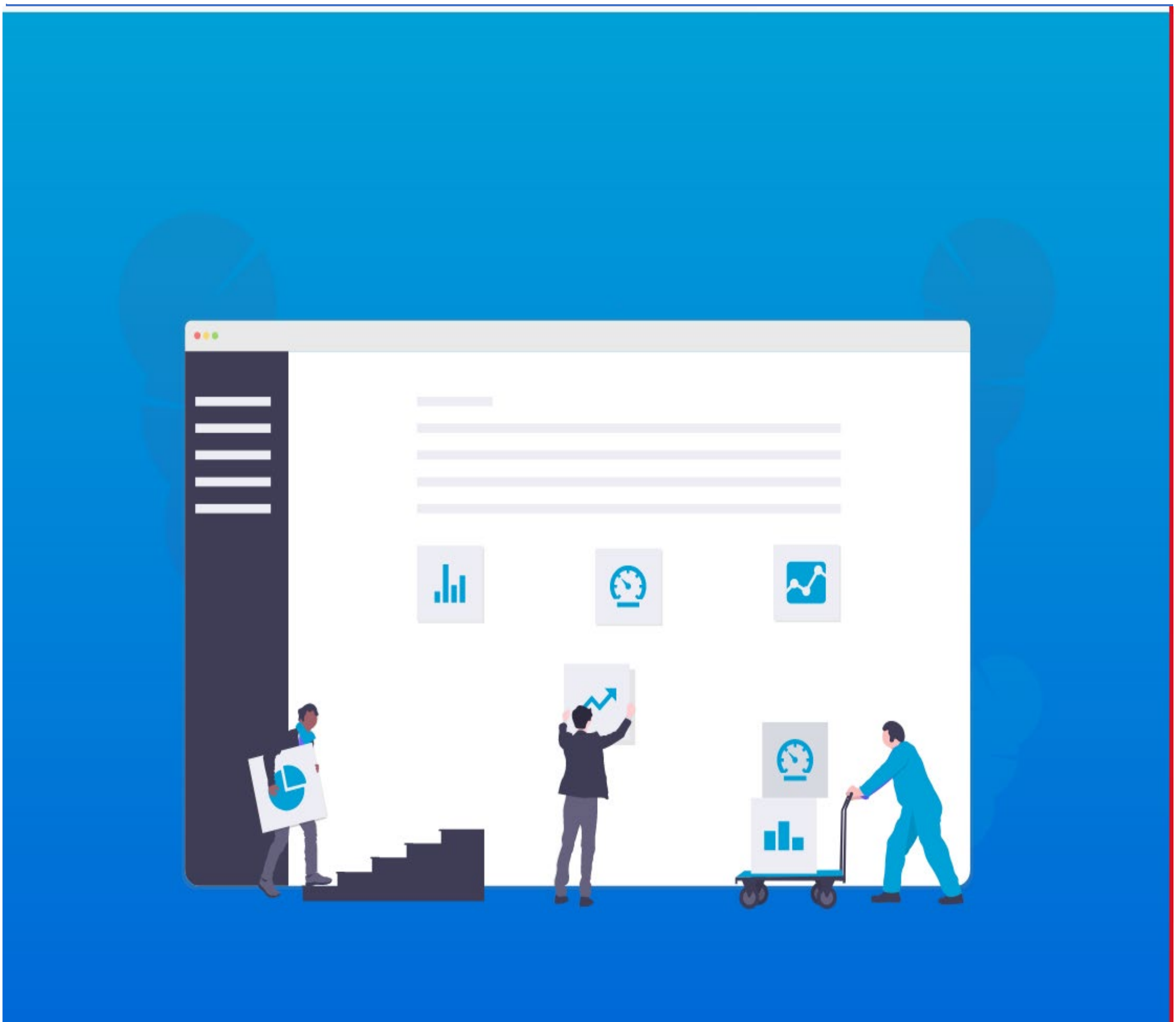


Table of Contents

Partner Management

About this Guide

The purpose of this guide is to provide conceptual and procedural information required to efficiently perform operations in Partner Management.

Audience

This document is intended for personnel involved in:

- Partner Management Administration
- Partner Management User

Licensing

You are required to comply with the terms of the applicable license agreements in connection with your use of the software.

Conventions

Table Document Conventions lists the formatting conventions that are used in this guide to make it easier for you to recognize and use specific types of information.

CONVENTION	DESCRIPTION	EXAMPLE
Body Text	Within a procedure, bold text indicates specific	On the Action Bar, click **Modify**.

	folder names or buttons in the GUI.	
Italicized Text	Within a procedure, italicized text indicates text that should be replaced with the name of the object or element that is specific to the procedure.	Navigate to **ROC Fraud Management** > **Alarm Management** > ***Your Network***.
	Within a command, italicized text represents variables, which must be substituted with specific values.	export CCP_RESET_TIMEOUT=*value*
Courier Text	Commands formatted as courier indicate shell commands that must be entered exactly as shown.	export CCP_ACTIVATION_TIMEOUT=180
Square Brackets	Within a command, optional parameters are shown in square brackets.	syexplain [-H] [-t hyperlink] errorCode
Curly Brackets	Within a command,	{ -a | -r | -l | -v }

	alternative parameters are grouped within curly brackets and separated by the vertical OR bar.	

Disclaimer

Updates of the product are a continuous process. Some of the functions explained may not go with the application installed at the customer site. In such cases, contact Subex customer support for clarifications.

Details furnished in screenshots must only be treated as examples. Any resemblance with the database of the user's network is only a coincidence.

Getting Started

Overview

Partner Management (PM) is a solution designed to develop marketing strategies and streamline business processes for a partner. It assists the partner to organise and maintain various business, growing partner revenue.

The Partner Management portal allows you to configure and maintain business relationship with a business partner. It follows the below sequence:

1. Configure a registration form
2. Registration
3. Partner Search
4. Workflow

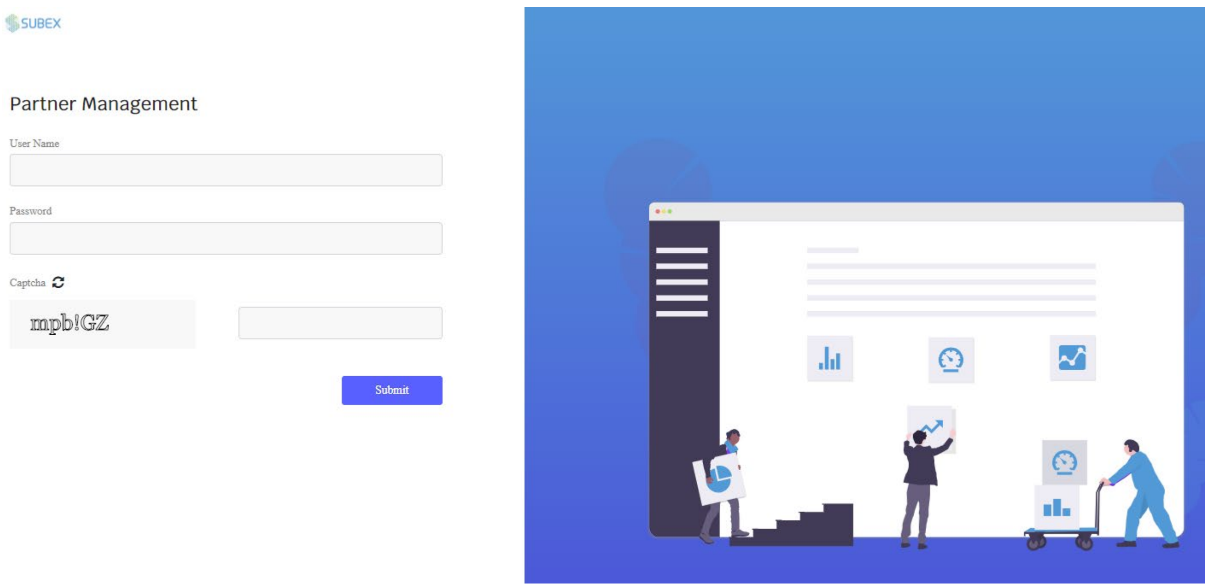
5. Dashboard
6. Panel Data

Working with Partner Management

The Partner Management landing page displays the details that are configurable. The login page allows you to perform Single Sign On.

To start Partner Management:

1. Open the browser.
2. Type the URL in the Address bar provided by the Partner Management Administrator. The Partner Management login window is displayed.



Logging In

To login to the Partner Management Portal:

1. In the Partner Management login page, complete the following fields:

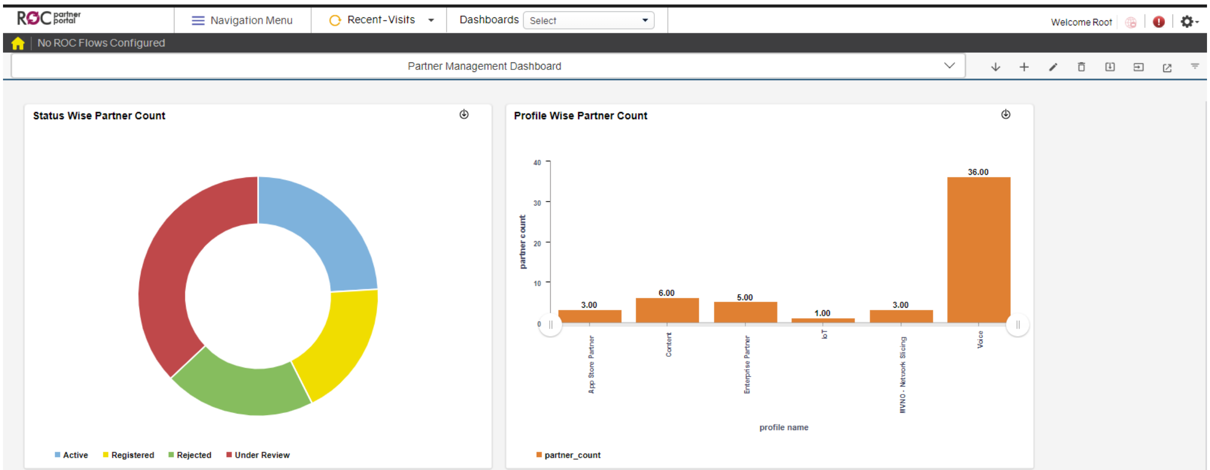
- **User name**: Enter the user name.
- **Password**: Enter the password.
- **Captcha**: Enter the displayed code.

2. Click **Submit**. The **ROC Partner Portal** landing page is displayed.

Introduction to the Partner Portal Landing Page

The ROC Partner Portal landing page is configurable as per your requirements and provides as a quick link to access the ROC Partner Portal solutions. Using quick links, you can navigate to the respective modules of the product.

The ROC Partner Portal landing page allows you to view the configured dashboards. You can access the dashboards based on the Roles and permissions. It also allows you to create Users and Roles. Users with administrative privileges are authorized to create user accounts.



How to navigate to the Partner Management Window?

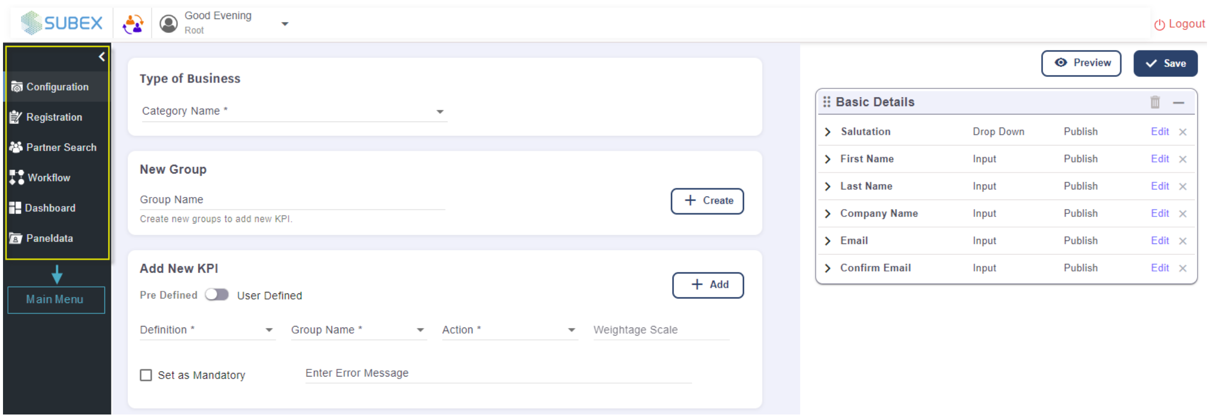
To access the Partner Management window:

Click 

, select **Partner Configuration** > **Partner Management**.

or

Search for Partner Management using the Search Bar. The **Partner Management Configuration** window is displayed.

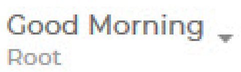


Change Password

A login credential with login ID and password is provided by your Partner management Administrator.

To change the password:

1. Click the arrow button beside your login name.



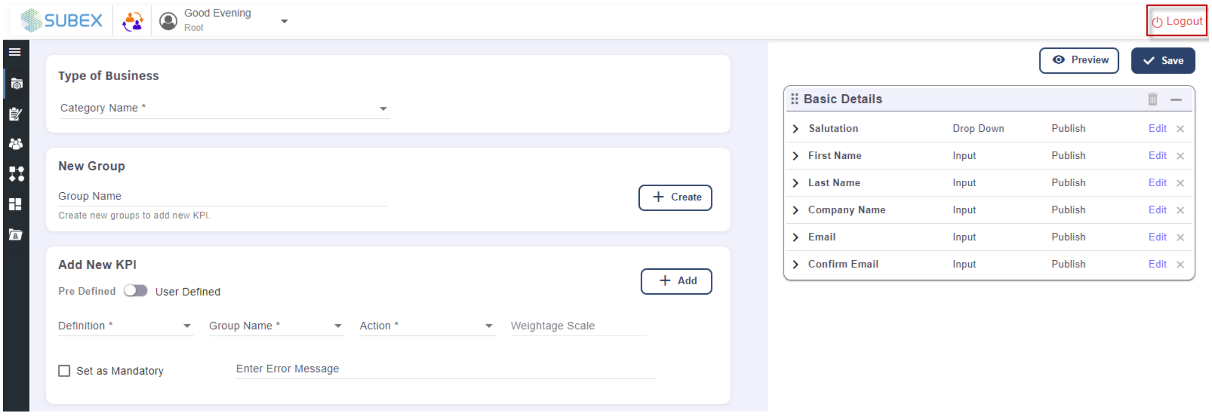
2. Click **Change Password** from the drop-down list.
3. Enter the new password.

Only the Administrator can create a new user and assign those credentials to you.

Logging Out

To log out of Partner Management Portal:

- On the toolbar, click Logout .



Configuration

Configuration of the Registration form

The user is allowed to configure a dynamic registration form based on the **Business type** and the **Information of the Partner**. This allows the partner to organize and maintain various business profiles using the KPI options provided.

To configure a Registration form:

1. Enter the following :

- **Type of Business**: Choose the **Category Name** from the drop down menu.
- **New Group Name**: Enter a **Group Name** and click + Create .

  Example: Basic Details, Company Name etc.

- **Add New KPI**: Enter KPI based on the **Profile Type** and Click 

.

  You can add Predefined and User defined KPI.

  For more information, see [Adding New KPI].

2. Click 

to preview the configured registration form.

3. Click 

to save the registration form. A pop up is displayed once the details are saved.

All the configured KPI are displayed on the right side of the window.

Adding New KPI

Predefined KPI

To add Predfined KPI:

1. Select **Predefined** and enter the following details:

- **Definition**: Select a predefined definition from the drop down list.
- **Group Name**: Select the **Group Name** to associate the **KPI** configurations.
- **Action**: Select the required action to be taken once the KPI Configurations are saved.
  - **Publish**: The KPI configurations are visible to the partner on the Registration form.
  - **Score**: The KPI configurations are not visible to the partner on the Registration form. However, these configurations are registered to score the partner and for internal use.
  - **Publish and Score**: The KPI configurations are visible to the partner.

  - **Internal**: The KPI configurations are used internally by the Partner Management Admin.

- **Weightage Scale**: Displays the score based on the information provided by the partner.

*This option is active, only if the action **Score** or **Publish and Score** is selected.*

- **Set Mandatory**: Allows you to choose to make a KPI a mandatory field on the registration form.

- **Enter Error Message:** Enter The error message that has to be displayed if wrong entry has been made in the registration form.
  Example: This is a mandatory field

2. Click + Add to add all the configured KPI.

A pop up is displayed on successful addition of KPI or if any of the mandatory fields are blank.

User Defined KPI

Select Pre Defined User Defined and enter the following details:

- **Definition**: Select a definition from the dropdown list.

- **Group Name**: Select the Group Name to associate the KPI configurations.

- **Action**: Select the required action to be taken once the KPI Configurations are saved.

  - **Publish**: The KPI configurations are visible to the partner on the Registration form.

- Score: The KPI configurations are not visible to the partner on the Registration form. However, these configurations are registered to score the partner and for internal use.
    - **Publish and Score**: The KPI configurations are visible to the partner.
    - **Internal**: The KPI configurations are used internally by the Partner Management Admin.
- **Weightage Scale**: Displays the score based on the information provided by the partner.
- **Use Prospect Profile**: If selected, the configured Panel Data is used.
- **Type**: Allows you to select the field type of the KPI.
  Example: Input, dropdown, multi select etc.
- **Validation**: Allows you to define a KPI field as mandatory.
- **Enter Error Message:** Allows you to enter the error message, if the KPI is a mandatory field.

This is visible only if Validation is selected as Mandatory.

Partner On boarding

A partner can register himself in two ways:

1. Partner Management Portal
2. Partner Care Portal

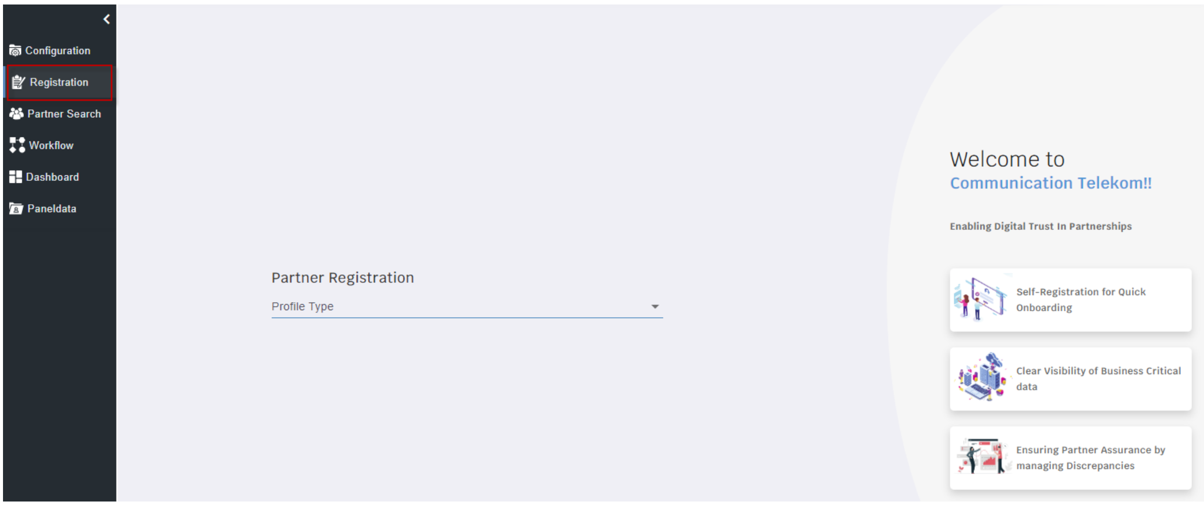
Registration through Partner Management Portal

To register from the Partner Management Portal:

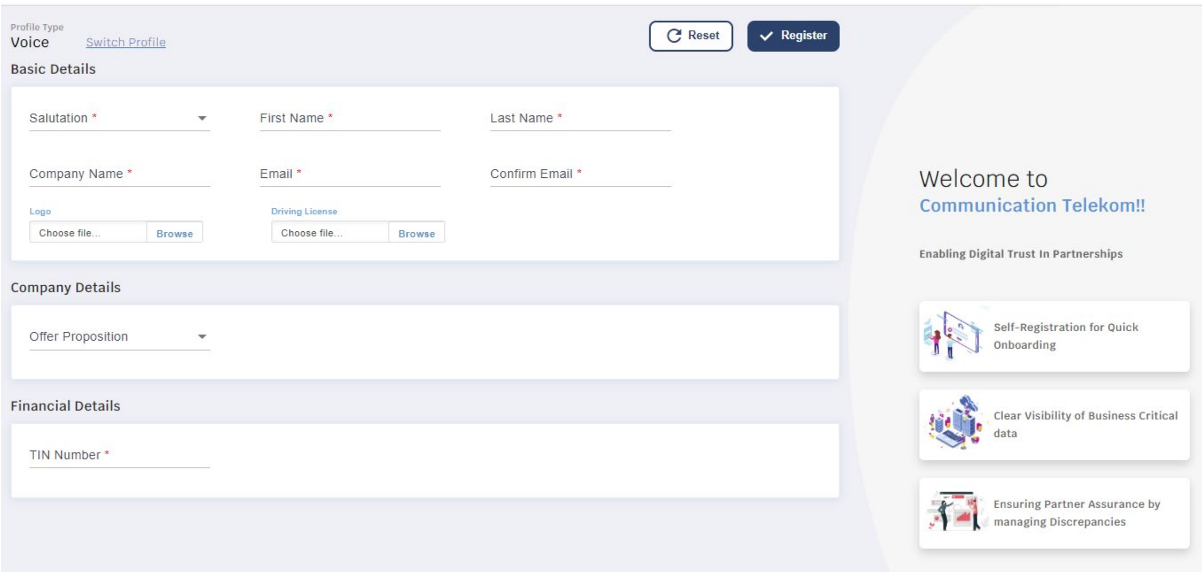
1. Login to the Partner Management Portal using your credentials.

2. Navigate to the **Partner Management landing page**.

3. Select **Registration** from the Left Pane, which is the main menu. The **Partner Registration** window is displayed.



4. Select the **Profile Type** from the drop down. The **Partner Management Registration details** window is displayed.



5. Enter the following details:

- **Basic Details**: Enter general information of the Partner.
    - Salutation

- First Name
- Last Name
- Company Name
- E-mail
- Confirm E-mail
- Logo: Allows you to upload a logo.
- Driving License

Basic Details are mandatory fields.

- **Company Details**: Enter the company details.

Displays the KPI configured for that profile type.

6. Click **Register**. A pop up is displayed on successful registration and the Partner is notified about the same through an e-mail.

7. The partner receives an e-mail with a link to check the status of the registration form as an acknowledgement.

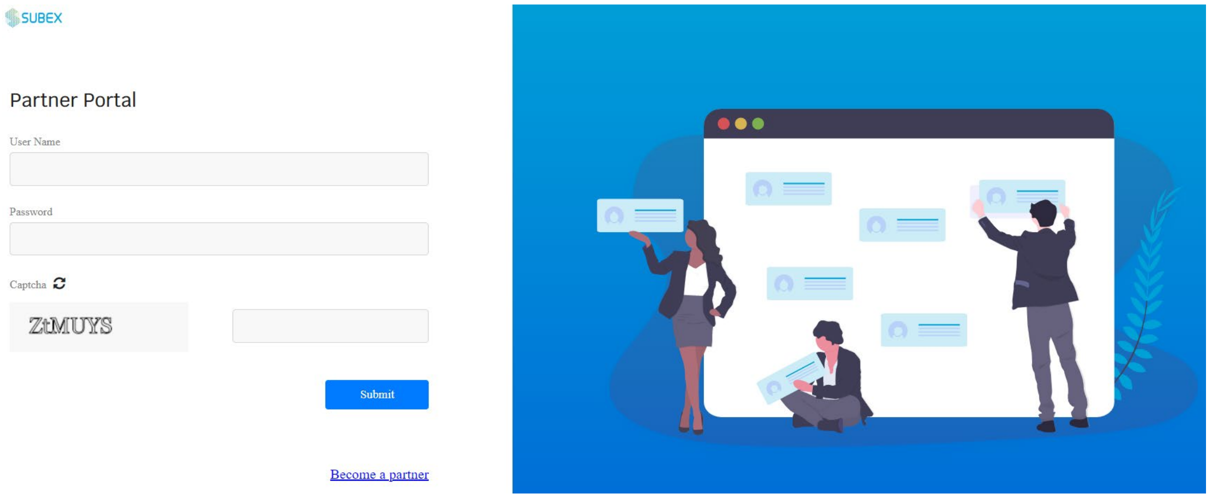
- **Switch Profile**: Allows you to switch between business profiles of a partner.

Logging On through Partner Care Portal

This option can be used if the **Partner** wants to register himself through a **Partner Management Administrator**.

To register from the Partner Care Portal:

1. Open the browser.
2. Type the URL in the Address bar, provided by the **Partner Management Administrator**. The **Partner Portal logon** window is displayed.



3. Click **Become a Partner**. The **Partner Registration** window is displayed.

4. Follow step 4, 5, 6 and 7 as mentioned above in the **Registration through Partner Management Portal** section.

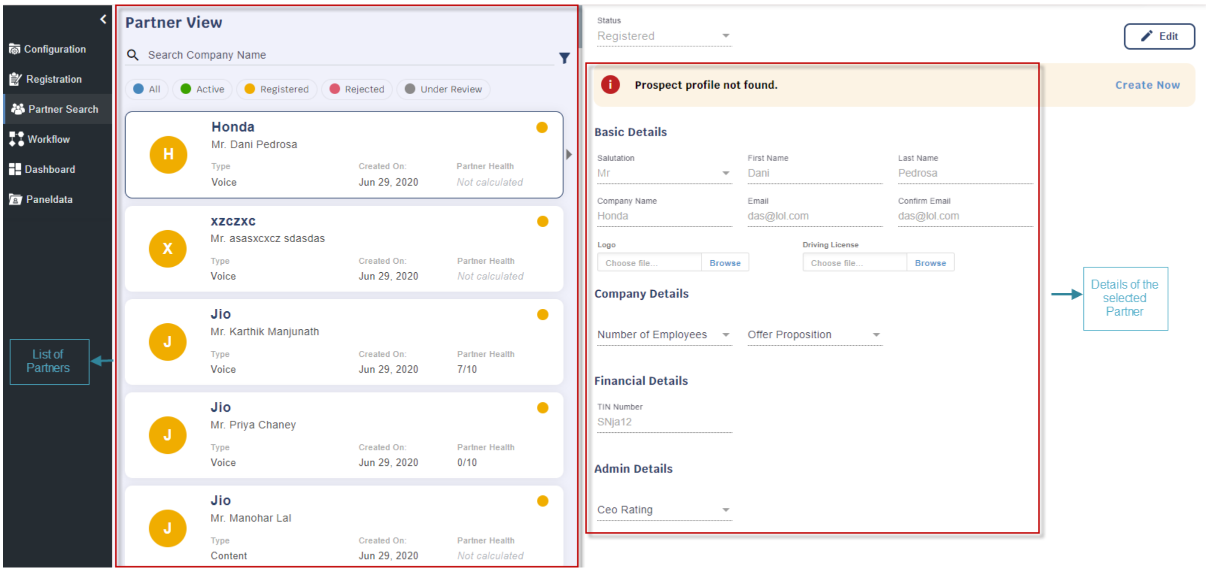
Partner Search

Partner View

The **Partner View** window displays the list of Partners registered on the Partner Management Portal along with their details and status. The user is allowed to filter and search based on the **Company Name** and their **Registration** status.

To access the Partner View window:

- Click **Partner Search** from the left pane. The **Partner View** window is displayed:



- A partner can be filtered using the following Registration status, which are colour coded:
  - **All**: Displays all the registered partners, irrespective of their registration status.
  - **Under Review**: Displays all the partners, whose profile is under review by the Partner Management Administrator.
  - **Active**: Displays the list of partner profiles in active status, which are approved by the PM admin.
  - **Registered**: Displays the list of registered partner profiles.
  - **Rejected**: Displays the list of rejected partner profiles by the Partner Management Administrator.

The following actions can be performed on this window:

- **Edit** : Allows you to edit the Partner's profile.
- **Reset**: allows you to reset the filters.
- **Status**: Allows the Partner Management Admin to change the status of the Partner profile.

- **Create** Now: Allows you to search for the selected partner's profile as per the **Panel Data Sources**.
- **Fetch**: Allows you to view the selected Partner's profile.
- **Link**: Allows you to link the KPI Configurations of Partner's profile and the Panel Data Sources, displaying the information such as **Score**, **Partner Health**.
- **Prospect View**: Displays the Partner information based on the Panel Data Details.

Workflow

Workflow

The workflow of Partner Management defines the process of Partner Registration.

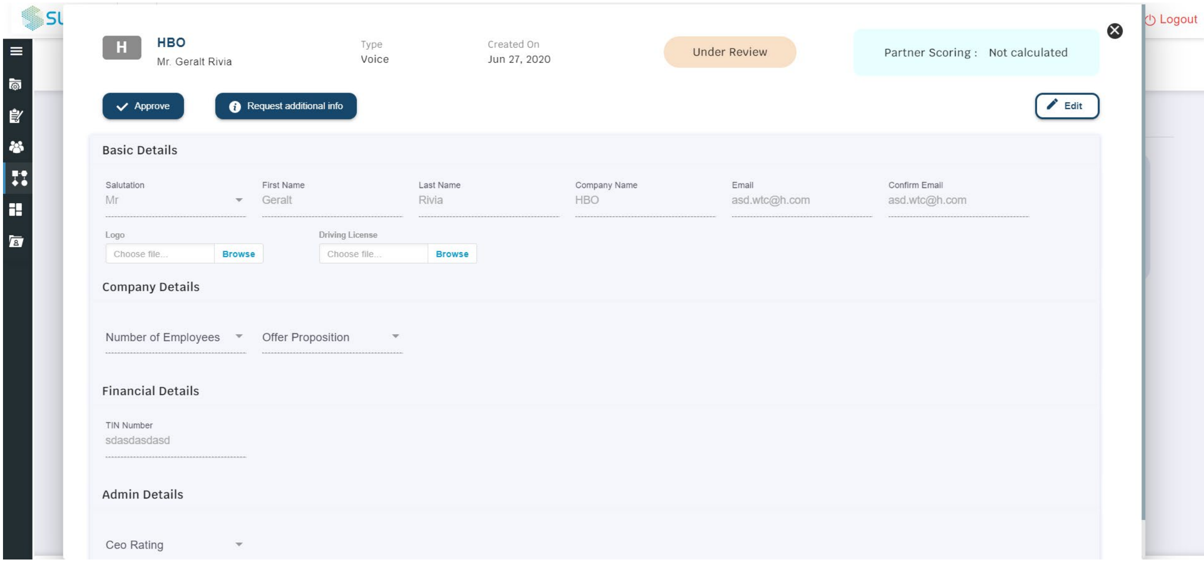
A Partner's profile is reviewed by three different teams:

1. Partner Management Admin
2. Finance
3. Sales

Each Team has a separate account.

The detailed workflow is as shown below:

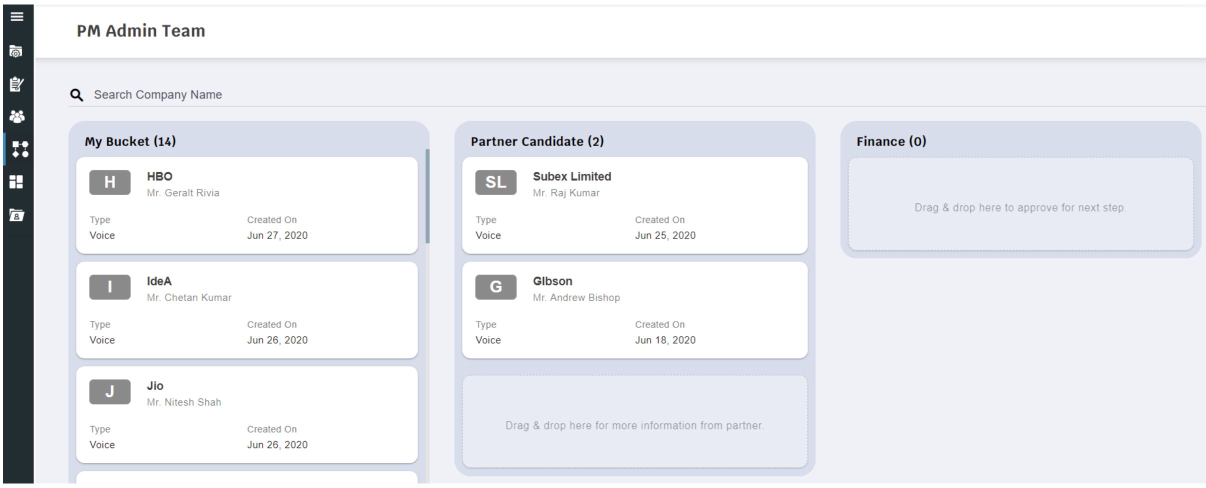
1. Partner completes the registration process and is acknowledged by an e-mail with a link to check the registration status. In the **Partner View** window, the partner's status is registered.
2. The Partner Management Admin reviews the partner's profile and the status is changes to **Under Review**. The Partner Management admin can request for Additional information from the Partner, if need be. The partner is notified about the same.



3. The Partner's Profile is moved to the next level if the PM admin approves of the information provided by the Partner.

4. The Finance Team reviews the Profile. The Partner is notified of the same.

5. The partner's profile is moved to the Sales team if the Finance team approves it or is moved back to the previous team, stating the reason for rejection.



6. The partner's profile is reviewed by the Sales Team. It is moved to Approved status if Sales team approves the profile.

Only the Partner Management Admin is allowed to Change the status of a Partner's profile to Active and move the card out of the workflow.

The following actions can be performed on this window:

- **Move Back**: Allows you to push the partner card to the previous bucket.
- **Enter the reason to move back**: Allows you to enter the reason to push the card back to the previous bucket.
- **Approve**: Allows you to move the card out of the Workflow.

Only the Partner Management Admin is allowed to move the card out of the workflow.

Dashboard

Dashboard

The dashboard is the landing page of the portal. This provides an overall glimpse of the recent information available for the partner.

Panel Data

Panel Data

The Panel Data window displays information of a company using three main sources for collection of data. This helps to keep track of a partner's business profiles.

- Employee Sentiment Profiler
- Financial Profiler
- Corporate Profiler

Source Configuration

To configure sources to fetch data based on KPI:

1. Select the source to be configured. The Source Grid expands displaying the list of KPI.
2. Select a KPI and click 

. The displayed Source Grid Collapses. The selected KPI, can be used as a scoring factor by selecting the **Use this for Scoring** option.

*If the **Use this for Scoring** Option is not selected for a selected KPI, it is displayed as information in the Prospect KPI View pane .*

3. Click 

. The configured KPI along with its source is displayed in the **Prospect KPI** View pane.

The KPI status remain inactive until the added KPI is saved.

About Subex

Subex Limited is a leading global provider of Business and Operations Support Systems (B/OSS) that empowers communications service providers (CSPs) to achieve competitive advantage through Business and Capex Optimisation - thereby enabling them to improve their operational efficiency to deliver enhanced service experiences to subscribers.

The company pioneered the concept of a Revenue Operations Center (ROC®) – a centralized approach that sustains profitable growth and financial health through coordinated operational control. Subex's product portfolio powers the ROC and its best-in-class solutions such as revenue assurance, fraud management, asset assurance, capacity management, data integrity management, credit risk management, cost management, route optimization and partner settlement. Subex also offers a scalable Managed Services program with 30 + customers.

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