COLLABORATE 12

TECHNOLOGY AND APPLICATIONS FORUM
FOR THE ORACLE COMMUNITY

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OAUG oracle applications users group

Session ID # 9293: Considering Salesforce.com? What you need to know as an Oracle e-Business Suite Customer

Ravi Balakrishnan
Partner, Prisio Technologies
ravib@prisiotechnologies.com
Phone: 484.358.4468

prisio Technologies

103 Carnegie Center, Ste 300
Princeton, NJ 08540

CRM
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PROJECT MANAGEMENT

REPORTING

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TECHNOLOGY

UPGRADE

Agenda

- Objectives
- Customer Integration
  - Directionality
  - Data model analysis
  - Mapping scenarios
- Quoting presentation layer integration
- Historical information load
- Use of middleware
- Case study
- Conclusion
- Q & A

Objectives

- Identify candidate business objects for integration
- Understand the opportunities and challenges with integration
- Implement best practices in integration
  - Organization
  - Process
  - Technology
- Through a case study understand what has been done and the associated challenges

Candidate Business Objects

- Customers
  - Parties, Accounts, Addresses, Contacts, Relationships, Contact Points
- Presentation Layer – Opportunity to Quote
- Territories
- Products/Items
- Price list
- Historical
  - Orders, Invoices, Contracts, Install Base

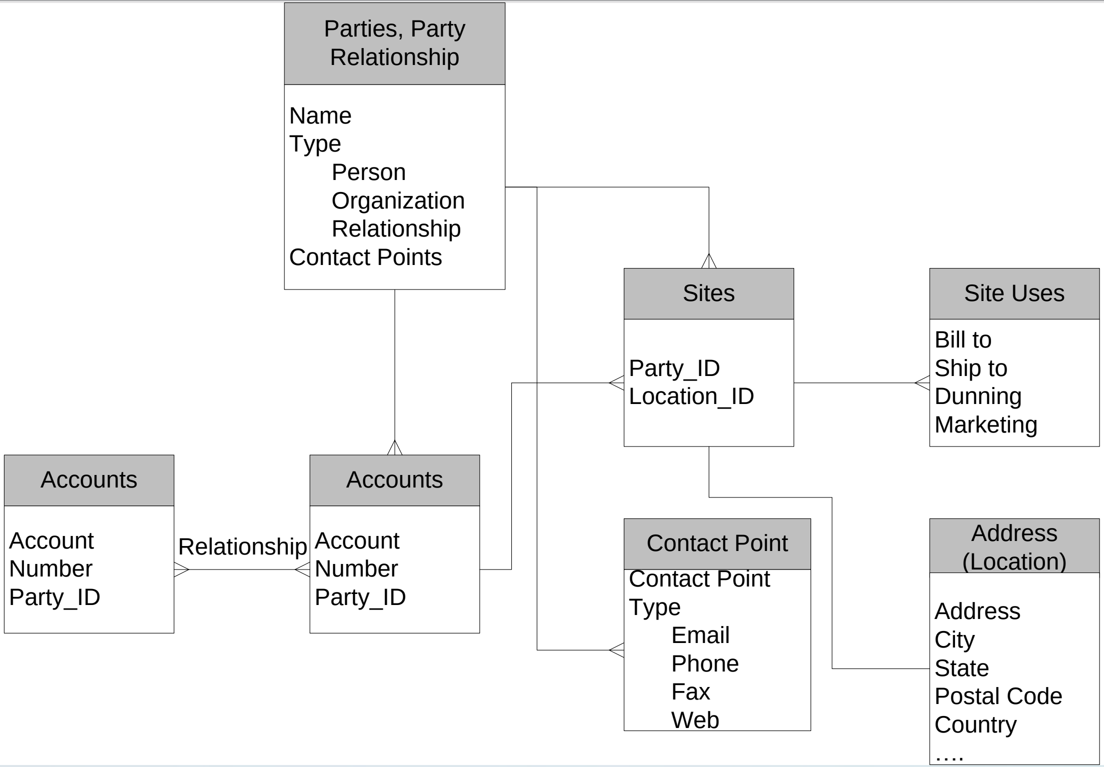
Customer Integration - Directionality

- Determine Directionality
  - Uni or Bi-Directional
- Criteria
  - Is there a customer maintenance team in place?
  - How is the customer data created?
    External Sources? Internally created?
  - How large is the customer data?
  - How fluid is the customer data?
  - How long is your sales cycle?

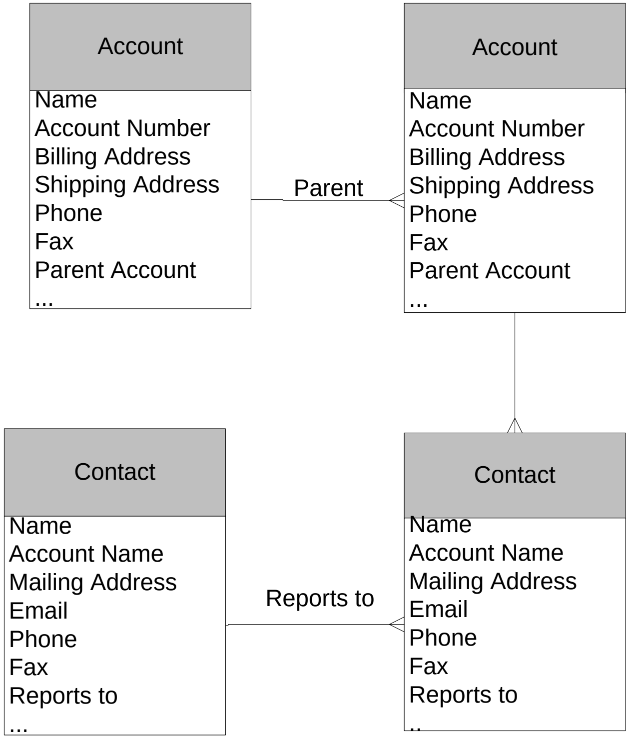
Customer Integration - Directionality

- Criteria (cont'd)
  - Customer model in place
  - Are there any address validation tools (data.com, DNB etc.) used? Is it planned to implement tools in both applications.
- Not all elements need to be bi-directional
  - For instance Customer/Account can be uni-directional and contacts bi-directional

Oracle Customer Data Model



Salesforce.com Customer Data Model



Data Model Analysis

Oracle TCA Model

- One to many relationship between customers
- Organization and person type parties
- Multiple accounts for a single customer
- Multiple addresses with varied business purposes
- Multiple contact points

Salesforce.com

- Single Party/Account
- One level relationship at Account level (Parent-Child)
- Multiple contacts per account
- Single Billing and shipping address per account
- One level relationship for contact

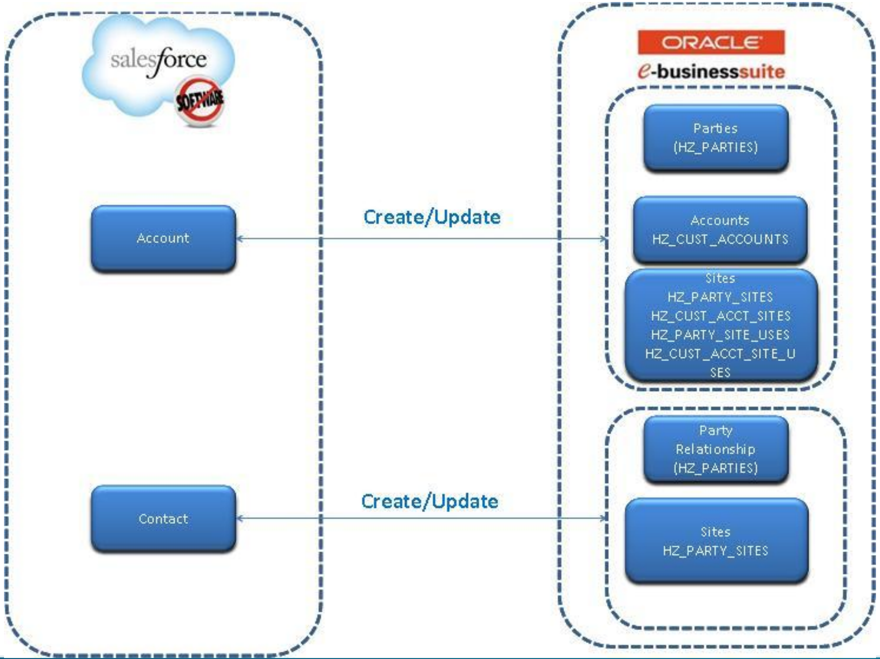
Customer Integration - Mapping

Account to Account Mapping

Assumes:

Every Party in Oracle has an account

Applicable for both full TCA and simple customer model



Customer Integration - Mapping

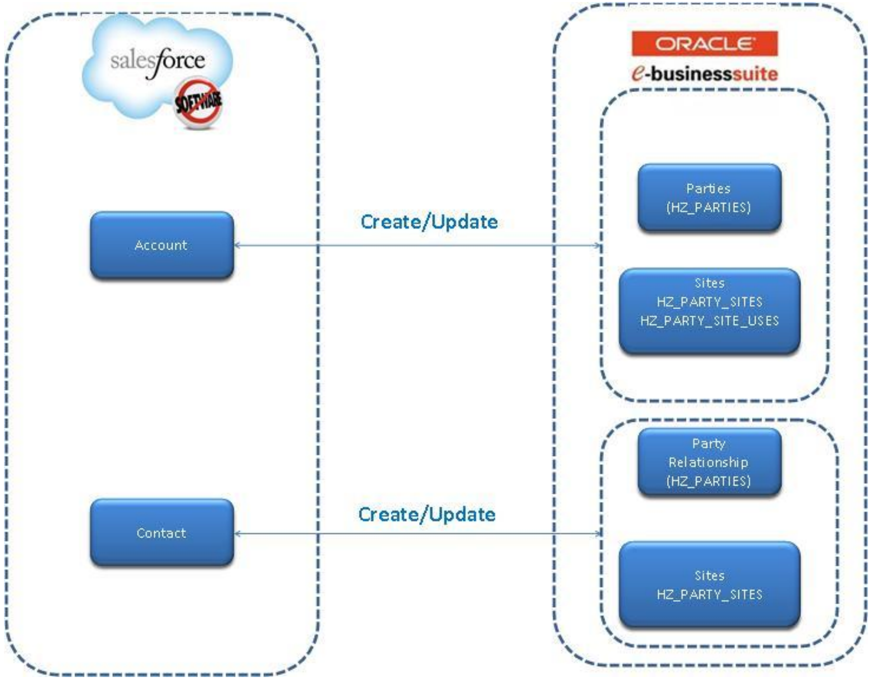
Account to Oracle Party Mapping

Every Party in Oracle has an account

Applicable for both full TCA and simple customer model

Salesforce.com account mapped to Oracle party

Account is created in Oracle when Financial transaction is executed



Customer Integration - Scenarios

#	Selling Model	Customer Model/Process	Analysis
1	B2B or B2C	Traditional Oracle Customer data model not leveraging TCA. Customers created using customer standard form in Oracle.	Use Salesforce.com to Oracle Account Mapping. **For B2C**: Person Account used in salesforce.com. This is not available as a default and has to be requested. Person Accounts are specific record types in salesforce.com
2	B2B or B2C	Using Parties without account but there is only one account per party in Oracle. Account created at the time a financial transaction is executed.	Use salesforce.com to Oracle party mapping. For B2C: Person Account used in salesforce.com. This is not available as a default and has to be requested. Person Accounts are specific record types in salesforce.com

Customer Integration - Scenarios

#	Selling Model	Customer Model/Process	Analysis
3	B2B and B2C	Traditional or TCA model used with one account per party.	Can use either salesforce.com account to Oracle party or Oracle account mapping. **For B2C:** Person Account used in salesforce.com. This is not available as a default and has to be requested. Person Accounts are specific record types in salesforce.com
4	B2B or B2C	Leveraging TCA model using Party relationships, account relationships.	Requires building custom objects to replicate in salesforce.com
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Custom Objects in Salesforce.com

Object	Description	Recommended Fields
Party Relationship	Custom object to support one to many party relationship.	Account (lookup value from accounts object) Related Account (lookup value from accounts object) Relationship Type (Picklist)
Communication or contact points	To store multiple contact points. Contact Point detail can be displayed on the hover on the contact or account screen.	Association Type (Picklist either account or contact) Related Object (Lookup value either account or contact) Communication type (Picklist) Email, Fax, URL, Phone
Additional Address	Salesforce.com standard account and contact object supports one billing and one shipping address.	Association type (picklist either account or contact), Address type (Picklist), Address (Address datatype)

Customer Merge

- Both salesforce.com and Oracle offer customer merge functionality
- Though Oracle supports auto merge, manual merge is recommended to keep data consistent
- When using uni-directional integration, perform merge in the master application first
- After merge ensure the mapping keys are consistent in both the applications
- Develop and implement a report to check data for consistency

Quoting – Presentation Layer Integration

- Determine if presentation layer integration is right solution
  - Do you have a quoting process in place?
  - Who enters quotes/orders in your organization?
  - How complex is your pricing model?
  - Do you use Oracle Configurator or similar tools in quoting?
- Determine the authentication mechanism required
  - Should a DMZ box be in place?
  - How is the authentication done (Active Directory, SSO)?
  - How should application context be set in Oracle (Responsibility ID, User ID, Session ID)

Quoting – Presentation Layer Integration

- Determine the Opportunity stage in which a quote can be created
- What data should be passed to Oracle?
  - Account
  - Opportunity Product line
  - Opportunity Contacts
- Are there any UI changes needed in Oracle to provide a seamless experience to salesreps?

Other Candidate Objects

- Territory Synchronization
  - Generally implemented when compensation is driven based on Territory hierarchy
  - No out-of-the-box territory APIs available
- Historical/Bulk Integration
  - Items (Products)
  - Price List (Price Books)
  - Orders/Invoices
  - Contracts and Install Base

Release Considerations

- Salesforce.com cloud is upgraded every three months
- Releases could include a new version of APIs
- Salesforce.com APIs are supported for a period of three years from the data of first release
- Always use the latest API release as much as practical
- Analyze and evaluate each Oracle patch for object changes
- Test and re-test

Use of Middleware

- Commercially available middleware products provide higher degree of flexibility
- Evaluate this against the cost of procurement and ownership
- Features normally available with middleware products:
  - Metadata driven mapping
  - Data translations without the need for coding
  - Integration mapping through MS Office based tools
  - Advanced scheduling capabilities

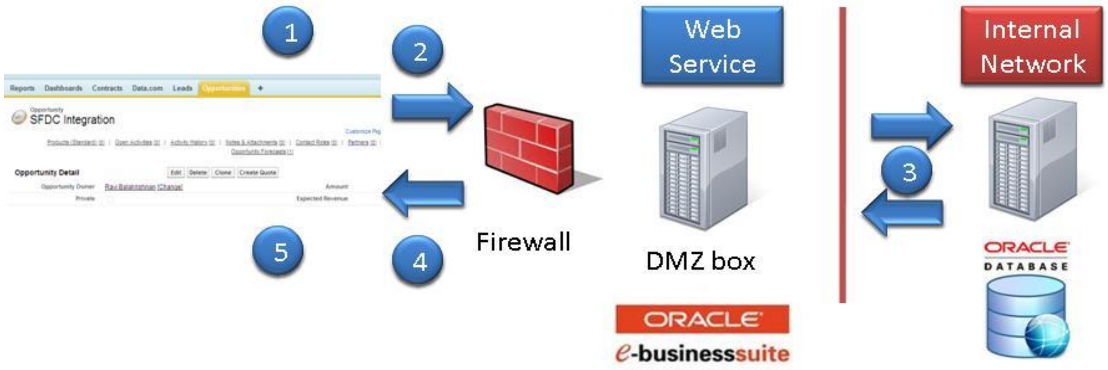
Integration Case Study

- Number of Salesreps: 7000
- Location: US
- Industry: Office Automation products and services
- Scope:
  - Customer uni-directional integration with Oracle as the master
  - Oracle quoting presentation layer integration
  - Historical data: Orders, Contracts and Install Base
  - Territory Synchronization using custom APIs

Integration Case Study – Delegated Authentication

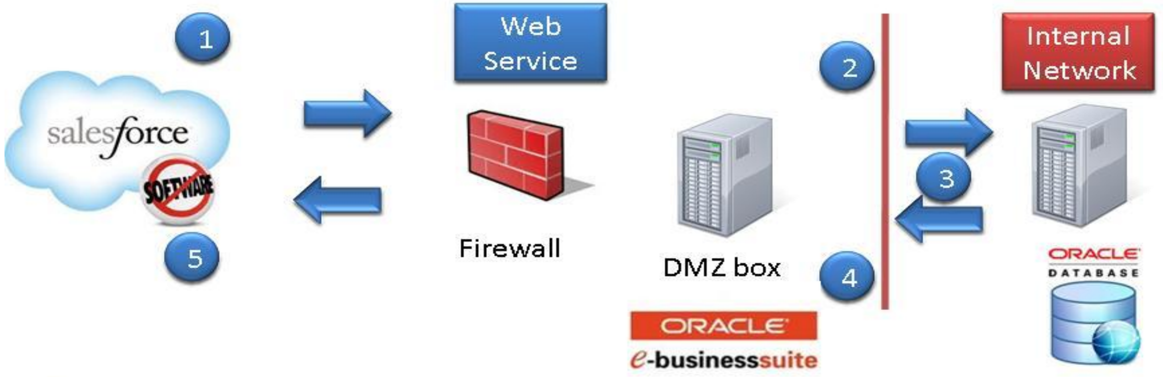
1. User enters username and password in salesforce.com
2. Salesforce.com passes the credentials to the DMZ box
3. DMZ box passes these credentials to Active Directory through web service
4. Web Service returns pass/fail back to Salesforce.com
5. If passed salesforce.com allows user through else denies access

Integration Case Study – Quoting Integration



1. User clicks Create Quote on the salesforce.com opportunity page
2. Salesforce.com passes the credentials to the DMZ box
3. DMZ box passes these credentials to Active Directory through web service. Web service also checks status of Oracle EBS
4. Web Service returns Employee ID/Resource ID if the user is still active
5. If passed SFDC lets user to the Oracle R12 and opens the Quote page

Integration Case Study – Context Switching



1. A new Tab is launched from salesforce.com to display Oracle Quoting with employee ID
2. A new user session is created using Guest User
3. Database is checked for user ID and corresponding employee ID
4. If record is found, context is switched to the new User ID, Responsibility and Application ID
5. If passed salesforce.com then Quoting UI is displayed.

Conclusion

- Get the customer integration right
- Setup a process for customer update
- Determine if a middleware product is necessary
- Determine security and authentication requirements
- Perform data cleanup, merges prior to migrating data to salesforce.com
- Identify other data required like Orders, Invoices, Contracts etc.
- Develop custom objects required in salesforce.com and include in your implementation plan
- Design, Build, Test and Implement

Q & A