



Oracle Application Integration
Architecture Release 1.0

Siebel CRM On Demand Integration Pack for Oracle E-Business Suite Implementation Guide

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1

Introduction to Siebel CRM On Demand Integration Pack for Oracle E-Business Suite

Contacting Technical Support

The CRM On Demand Training and Support Center is a single access point to a wide range of help, training, and support resources that help you get more out of Siebel CRM On Demand. It provides 24/7 access to create and modify service requests as well as display system status alerts and notifications. To access the Training & Support Center, log into Siebel CRM On Demand (<http://www.oracle.com/crmondemand/index.html>) and click on the Customer Care link.

TTY Access to Oracle Support Services

Oracle provides dedicated Text Telephone (TTY) access to Oracle Support Services within the United States of America 24 hours a day, seven days a week. For TTY support, call 800.446.2398.

Documentation Accessibility

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Structure

- 1 [Introduction to Siebel CRM On Demand Integration Pack for Oracle E-Business Suite](#)
- 2 [Siebel CRM On Demand Integration Pack for Oracle E-Business Suite Environment](#)
- 3 [About Integrating Customer Data, Products, and Quotes](#)
- 4 [Installing and Configuring the Applications](#)
- 5 [Initial Bulk Loading of Customer, Contact, and Product Data](#)
- 6 [Troubleshooting](#)

Related Documents

For more information, see the following documents:

- [Oracle Customers Online User Guide](#)
- [Oracle Customers Online Implementation Guide](#)
- [Oracle Quoting Implementation Guide](#)
- [Oracle Quoting User Guide](#)
- [Oracle Trading Community Architecture User Guide](#)
- [Oracle Trading Community Architecture Administration Guide](#)
- [Oracle Trading Community Technical Implementation Guide](#)
- [DQM Administration Guide](#)
- [Siebel CRM On Demand Online Help](#)

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle strongly recommends that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data, and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change that you make using an Oracle Applications form can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you can change a row in one table without making the corresponding changes in the related tables. If your tables are out of synchronization with each other, you risk retrieving erroneous information, and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you can store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

Glossary

360° View. A screen within the Oracle Customer Online application that displays a comprehensive list of contracts, credit information, email interactions, invoices, orders, quotes, payments, projects, and service requests for a given customer.

Account. In Oracle an account describes the specific attributes of a party that are relevant to the selling relationship that the implementing organization has established with a party. An account in Oracle cannot exist by itself without a party. It can be associated with an individual (person) or a company (organization). In Siebel CRM On Demand an account describes an organizational customer.

BES. Oracle Business Event System based on Oracle Workflow.

BOM. Bill of materials—defines the components and hierarchy of a product.

BPEL. Business Processes Execution Language, a standards-based extensible language.

Catalog Category. A category is a logical classification of items that have similar characteristics.

Category Set. Category sets can be used as a means of developing custom lists of items, which you can report and sort. A category set is a distinct grouping scheme and consists of categories.

CBM. The created_by_module column in Trading Community Architecture tables.

CDH. Oracle Customer Data Hub.

Contact. In Oracle E-Business Suite 11i, a contact describes a specific relationship between two parties, more specifically between an Organization and a Person party, which is also called an Organization Contact. The Organization Contact can also be associated with a Customer account in Oracle, which is then called an account contact. In Siebel CRM On Demand a contact describes an individual customer who might or might not be related to an account (Organization customer) or another contact (individual customer).

Customer. In Oracle E-Business Suite 11i a customer is defined as a party with whom the implementing organization has established a selling relationship. All relevant information of the specific selling relationship with a party is modeled in the account layer entities in Oracle, whereas all the base information like name, address information, contact points are modeled in the party layer entities. A customer in Oracle can be an individual (person) in the case of a Business-to-Consumer relationship, or a company (organization) in the case of a Business-to-Business relationship. In Siebel CRM On Demand a customer can be either modeled as an account or as a contact. An account in Siebel CRM On Demand is the equivalent of an organization party and account in Oracle, and a contact is the equivalent of a person party and account in Oracle.

FMW. Fusion Middleware.

Install Base. An Oracle record of the goods and services that a customer owns.

Item. A product or service that is manufactured or sold. Items can be used to represent grouping assemblies or placeholders such as phantoms.

Middleware. Integration software that is used to connect applications, such as Webmethods.

Oracle EBS. Oracle E-Business Suite applications.

Order Management. Refers to organizations as warehouses on all Order Management windows and reports.

Organization. A business unit, such as a plant, warehouse, division, department, and so on.

OS. The orig_system column in Trading Community Architecture table.

OWB. Oracle Warehouse Builder.

Party. In the Oracle E-Business Suite 11i, more specifically in the Trading Community Architecture, a party is defined as any individual or organization with whom the implementing organization can do business. A party in Oracle Trading Community Architecture could be a customer (for example, in the case of a selling relationship), a vendor, or an employee. The same party can have multiple such roles within Oracle E-Business Suite 11i. In the context of this integration solution only those parties in Oracle E-Business Suite 11i that represent customer data are addressed. The concept of a party does not exist in Siebel CRM On Demand.

SOA. Service Oriented Architecture.

SCOD. Siebel CRM On Demand application.

TCA. Trading Community Architecture.

2

Siebel CRM On Demand Integration Pack for Oracle E-Business Suite Environment

This chapter describes the environment needed for Siebel CRM On Demand Integration Pack for Oracle E-Business Suite. It contains the following information:

- [About Siebel CRM On Demand Integration Pack for Oracle E-Business Suite on page 11](#)
- [Software Requirements on page 13](#)
- [Data Quality on page 14](#)
- [Cross-References on page 14](#)
- [Language Support on page 15](#)

About Siebel CRM On Demand Integration Pack for Oracle E-Business Suite

The Siebel CRM On Demand Integration Pack for Oracle E-Business Suite integrates account, customer, order, and quote information between Siebel CRM On Demand and Oracle E-Business Suite. The functionality provided by this integration includes:

- Creating accounts with Data Quality Management
- Creating contacts with Data Quality Management
- Enabling Siebel CRM On Demand opportunity to Oracle E-Business Suite quote conversion business process
- Synchronizing customer data from Oracle E-Business Suite to Siebel CRM On Demand
- Synchronizing customer data from Siebel CRM On Demand to Oracle E-Business Suite
- Synchronizing product data from Oracle E-Business Suite to Siebel CRM On Demand

Figure 1 shows an overview of the components of the integration.

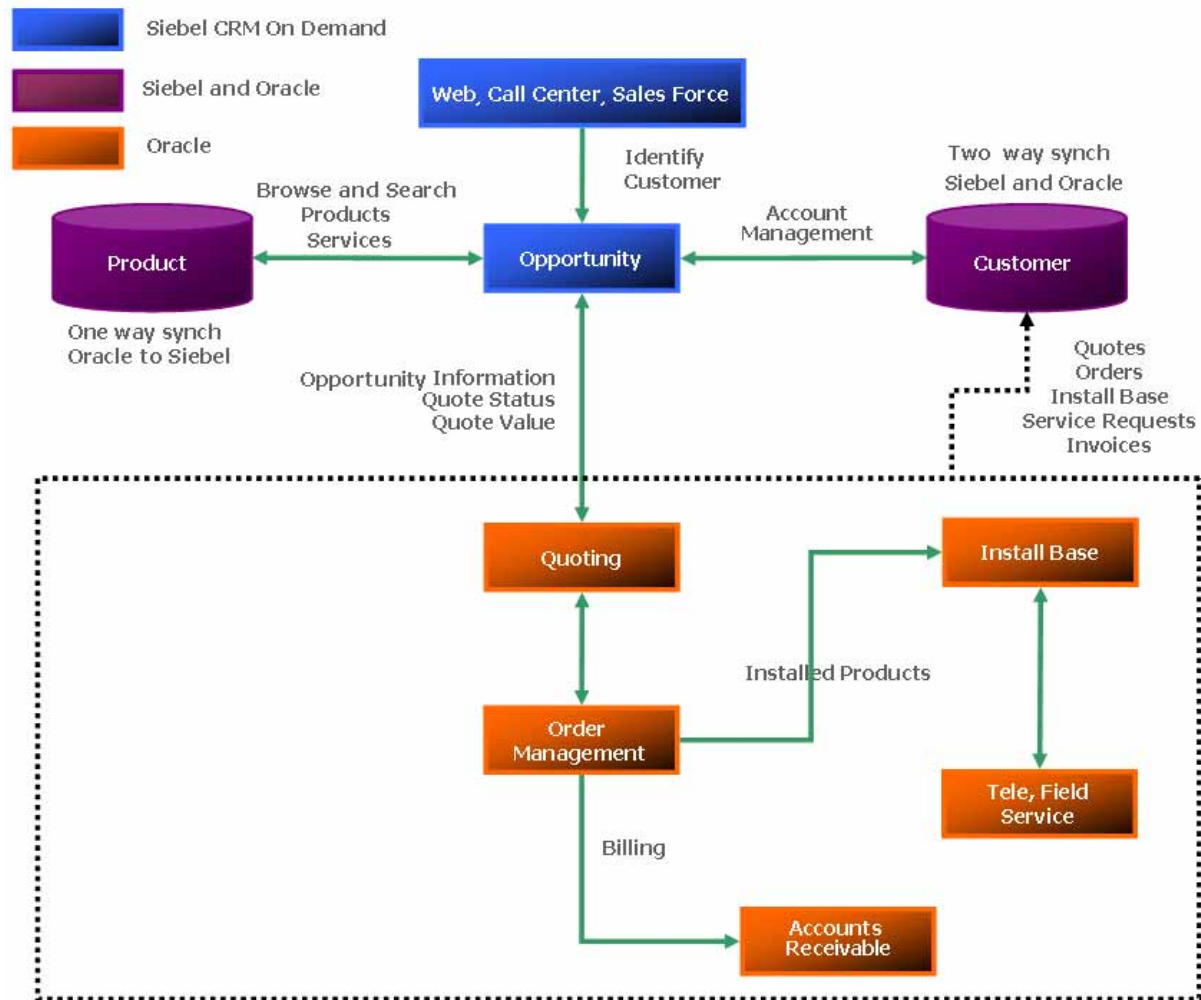


Figure 1. Integration Summary

Oracle E-Business Suite data objects and Siebel data objects do not have an exact 1:1 equivalence for every field. To convert the data appropriately, the Siebel CRM On Demand Integration Pack for Oracle E-Business Suite uses Fusion Middleware (FMW) and Oracle Business Process Execution Language (BPEL). [Figure 2](#) shows this architecture.

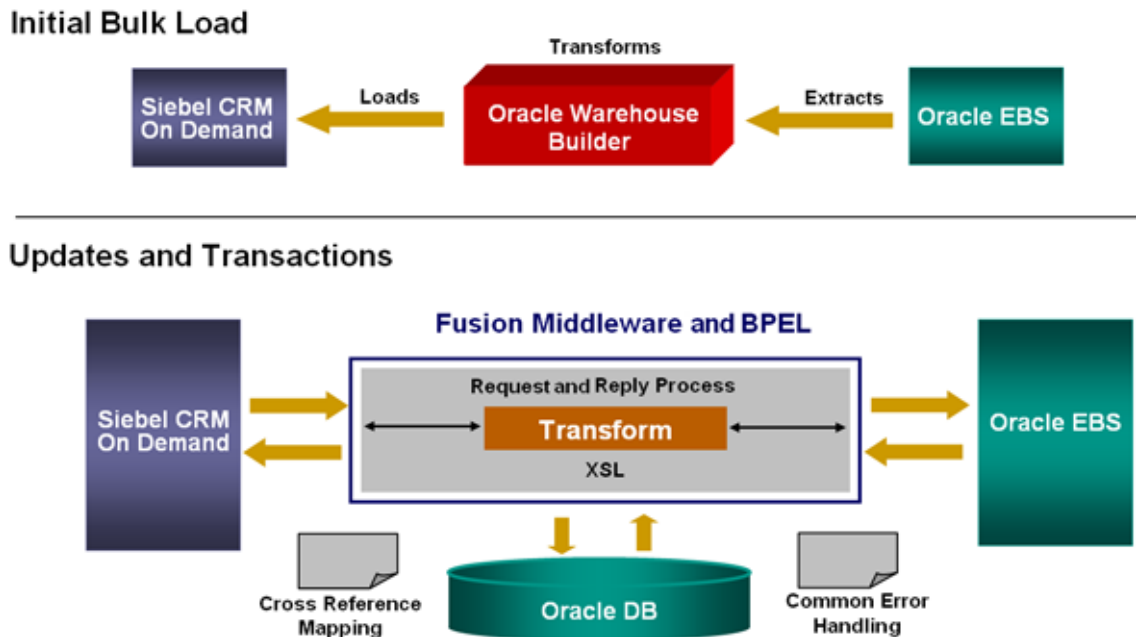


Figure 2. Integration Architecture

FMW and BPEL are used in the real-time updates between Oracle E-Business Suite and Siebel CRM On Demand. However, before these products can be used together, a one-time initial data load is needed to synchronize Siebel CRM On Demand with Oracle E-Business Suite. For more information about initial loading of data, see [Chapter 4, “Initial Bulk Loading of Customer, Contact, and Product Data.”](#)

Software Requirements

The Siebel CRM On Demand Integration Pack for Oracle E-Business Suite requires the following versions:

- Oracle 10.1.3.1 Application Server Enterprise Edition
- Oracle E-Business Suite, 11.5.10 CU2
- Oracle JDeveloper 10.1.3.1 (upgraded to the latest patch)
- Oracle SOA Suite 10.1.3.1 (upgraded to the latest patch)
- Oracle Warehouse Builder 10gR2 (Optional)

Data Quality

You can choose to enable the standard Oracle Data Quality Management (DQM) duplicate check when creating new customer data. A profile option within Oracle E-Business Suite can control this functionality (see [Table 8 on page 46](#)).

Within the process flow that creates the new Siebel CRM On Demand customer in Oracle E-Business Suite and later also in Siebel CRM On Demand, the Oracle Data Quality Management (DQM) Search Service can be called to identify possible duplicate customers during data entry and before the customer is created in Oracle E-Business Suite. The user can control whether the DQM Search Service is called from the process flow using a standard profile option in Oracle E-Business Suite (see [Table 8 on page 46](#)).

If you choose to check for duplicates in Oracle E-Business Suite and if the Oracle DQM Search Service returns one or more possible duplicate customer records, the possible duplicate customer records are displayed to the user in the user interface. The user can then choose to either pick one of the existing customers (in case the newly entered customer is a true duplicate), or create the new customer record in Oracle E-Business Suite (in case the newly created customer is not a duplicate). If the user chooses to pick a customer that already exists in Oracle E-Business Suite, the process orchestration flow retrieves the customer record from Oracle E-Business Suite and creates the customer record in Siebel CRM On Demand. This flow assumes that the user has already executed a duplicate search within Siebel CRM On Demand before entering into the Create Account/Contact transaction.

Cross-References

To support ongoing customer data synchronization between Oracle E-Business Suite and Siebel CRM On Demand, a cross-reference of the unique identifiers of customer data is maintained in Siebel CRM On Demand. The entities that are cross-referenced on the Siebel side are account, address, and contact, which correspond to organization, party site and an organization contact in Oracle E-Business Suite.

For newly created customer records in Oracle E-Business Suite that need to be synchronized with Siebel CRM On Demand, Oracle E-Business Suite publishes the Oracle unique identifiers, which may be mapped to the External ID attribute of the appropriate entity in Siebel CRM On Demand to establish the cross-references within Siebel CRM On Demand.

For updated customer records that need to be synchronized with Siebel CRM On Demand, Oracle publishes the Oracle unique identifiers. The Siebel CRM On Demand Web Service interfaces are able to uniquely identify the records in Siebel CRM On Demand that need to be updated.

Oracle does not store the Siebel CRM On Demand unique identifier of the customer record.

Language Support

Table 1 lists the languages supported for databases as part of this integration pack.

Table 1. Supported Languages for Siebel CRM On Demand Integration Pack for Oracle E-Business Suite

Language	Character Set
Chinese (Simplified)	ZHS16GBK
German	WE8MSWIN1252
English-British	WE8MSWIN1252
English-American	WE8MSWIN1252
Spanish	WE8MSWIN1252
French	WE8MSWIN1252
Italian	WE8MSWIN1252
Japanese	JA16SJIS
Korean	KO16MSWIN949
Portuguese	WE8MSWIN1252

Base the product data synchronization on the Siebel CRM On Demand company's default language.

3

Installing and Configuring the Applications

This chapter describes how to install and configure the Siebel CRM On Demand Integration Pack for Oracle E-Business Suite. It also describes how to configure the Oracle E-Business Suite and Siebel CRM On Demand to work with Siebel CRM On Demand Integration Pack for Oracle E-Business Suite. This chapter contains the following sections:

- [Process of Installing Components on page 17](#)
- [Configuring Components on page 21](#)
- [Process of Configuring the Oracle E-Business Suite Environment on page 41](#)
- [Process of Configuring the Siebel CRM On Demand Environment on page 50](#)
- [About Using Customized Fields on page 58](#)

Process of Installing Components

Complete the following tasks to install the components for Siebel CRM On Demand Integration Pack for Oracle E-Business Suite. These tasks must be completed in the specific order listed:

- 1 [Downloading Required Software for Installation on page 17](#)
- 2 [Installing Fusion Middleware Software on page 18](#)
- 3 [Installing Oracle E-Business Suite Patches on page 18](#)
- 4 [Installing Fusion Middleware and JDeveloper Patches on page 20](#)
- 5 [Installing and Deploying Siebel CRM On Demand Integration Pack for Oracle E-Business Suite on page 21](#)

Downloading Required Software for Installation

This media pack contains the necessary files to support integration between Oracle E-Business Suite and Siebel CRM On Demand. Download these files from <http://edelivery.oracle.com> by choosing Oracle Application Integration Architecture from the Product Pack drop-down menu and choosing the platform to be used for your SOA Suite installation.

Download the following files:

- 1 Siebel CRM On Demand Integration Pack for Oracle E-Business Suite, v1.1, Implementation Guide (Documentation_ODIPv1.1.zip)
- 2 Oracle Database 10g Release 2 (10.2.0.1) (file name(s) and count vary by platform)
- 3 Oracle Database 10g Release 2 Patches (DB_Patches_AIAv1.0.zip)
- 4 Oracle SOA Suite 10g (10.1.3.1.0) (file name(s) and count vary by platform)

- 5 Siebel CRM On Demand Integration Pack for Oracle E-Business Suite, Fusion Middleware Patches (FMW_Patches_AIAv1.0.zip)
- 6 Siebel CRM On Demand Integration Pack for Oracle E-Business Suite, E-Business Suite Patches (EBS_Patches_AIAv1.1.tar.gz)
- 7 Siebel CRM On Demand Integration Pack for Oracle E-Business Suite, v1.1, (SEBLODIntegPkEBSv1.1.zip)

Installing Fusion Middleware Software

Install the following Fusion Middleware components:

- 1 Oracle Database 10g Release 2 (10.2.0.1) Enterprise Edition.
Download and install the database only if you do not already have an Oracle 10.2.0.2 (or higher) database instance available for the SOA Suite to access. For information on installing Oracle Database, refer to the Oracle Technology Network. Oracle Technology Network link has the following URL:
<http://www.oracle.com/technology/documentation/index.html>
After installation, apply the appropriate patch from DB_Patches_AIAv1.0.zip (choose the patch appropriate to the operating system that your database is installed on.) This patch brings the database up to required version 10.2.0.2.
- 2 SOA Suite 10g10.1.3.1
For information on installing Oracle SOA Suite, refer to the Oracle Application Server Documentation Library. The library is available on the Oracle Technology Network. Oracle Technology Network link has the following URL:
<http://www.oracle.com/technology/documentation/index.html>
- 3 Oracle JDeveloper 10.1.3.1 (Studio Version)
Download Oracle JDeveloper from:
<http://www.oracle.com/technology/software/products/jdev/archives.html>.
This is a free download. Support for JDeveloper is not included. If desired, support for JDeveloper can be purchased separately. For information on installing Oracle JDeveloper, refer to the Oracle Technology Network. Oracle Technology Network link has the following URL:
<http://www.oracle.com/technology/documentation/index.html>
- 4 Oracle Warehouse Builder 10gR2 10.2.0.1 (optional component)
Oracle Warehouse Builder is an optional component that should be used to perform initial data synchronization from Oracle E-Business Suite to Siebel CRM On Demand if customer or product data already exists in E-Business Suite. Use of OWB for initial data synchronization requires the ETL and Data Quality options from Oracle Warehouse Builder. OWB is not included in this media pack and, if needed, must be licensed separately.

Installing Oracle E-Business Suite Patches

Install the Oracle E-Business Suite patches described in this section. If a patch has already been installed, there is no need to reinstall it. The latest version of each patch can be downloaded from <http://metalink.oracle.com>.

- 1 Download the Oracle E-Business Suite patches. The file name is:
EBS_Patches_AIAv1.1.tar.gz
- 2 Use the tar utility to extract the Oracle E-Business Suite patches from
EBS_Patches_AIA1.1.tar.gz. The command is:
tar -xzf EBS_Patches_AIA1.1.tar.gz
- 3 After extracting, there are two tar files: platform.tar and generic.tar.
- 4 Extract these two tar files using these commands:
tar -xf platform.tar
tar -xf generic.tar
- 5 Extracting from generic.tar yields a set of platform-independent EBS patch zip files. Apply each of these patches to your Oracle E-Business Suite application.
- 6 Extracting from platform.tar yields six platform-specific tar files:
aix.tar, hpux11.tar, linux.tar, solaris.tar, tru64.tar, and winnt.tar.
- 7 Use the appropriate platform file for your Oracle E-Business Suite installation to yield the platform-specific patch zip files.
Example: tar -xf solaris.tar
- 8 Apply each of these patches to your Oracle E-Business Suite application.

Table 2 lists the patches that must be installed for Oracle E-Business Suite (EBS).

NOTE: Always check Metalink for the latest versions of all patches.

Table 2. Mandatory Patches for Oracle E-Business Suite

Patch Number	Comments
3618299 (HZ.N)	This patch is a prerequisite for patch 5046954.
5046954	This patch contains PL/SQL Application Programming Interfaces that are called by the integration processes. It also contains the code that raises business events that are picked up by the integration processes.
5221628	Oracle E-Business Suite patch contains the new Oracle E-Business Suite user interface for create account, create contact, and so on, which are embedded in Siebel CRM On Demand as Web links. It also contains Subscription to Business Events.
6021150	This patch enables product business events, which are used for product synchronization between Oracle E-Business Suite and Siebel CRM On Demand.
5368824	This patch hides hyperlinks on Data Quality Management pages.
5398458	Enhancements for OCO Transaction Viewer.
5451612	A JTT patch that enables Quoting Navigation.
5505578	This patch installs Quoting updates.
5605532	This patch installs the Order Capture updates.

Table 2. Mandatory Patches for Oracle E-Business Suite

Patch Number	Comments
5839660	UIX version 2.2.24 and patch for Oracle E-Business Suite 11.5.10CU2.
5916062	This patch is to be applied to the Oracle EBS HTTP Server enables non-ASCII character support.

Table 3 lists recommended patches to be installed.

Table 3. Recommended Patches for Oracle E-Business Suite

Patch Number	Comments
4280097	This patch is required if you are using Customer Merge capabilities in Oracle E-Business Suite.
4351001	This patch hides the Update icon on Duplicate Prevention pages.
4775835	Fixes an error in messageLOVChoice for Country and Currency when used with the custom Siebel CRM On Demand Look and Feel in combination with a non-English language.

Installing Fusion Middleware and JDeveloper Patches

Install the Fusion Middleware and JDeveloper patches described in this section. If any particular patch has already been installed, there is no need to reinstall it. The latest version of each patch can be downloaded from <http://metalink.oracle.com>.

- 1 Download the Fusion Middleware and JDeveloper patches. The file name is: FMW_Patches_AIAv1.0.zip
- 2 Unzip the file to yield the mandatory bug-fix patches listed in Table 4.

Table 4 lists the patches that must be installed.

Table 4. Patches for Fusion Middleware and JDeveloper

Patch Number	Comments
5473225	Fixes problems that involve catching an exception during a transform.
5596476	Fixes problems that involve the XSLT map not rendering in the user interface.
5609537	Fixes issues with commit in child processes.

Table 4. Patches for Fusion Middleware and JDeveloper

Patch Number	Comments
5917910	<p>Fixes problems that involve:</p> <ul style="list-style-type: none"> ■ Creating <XSL:variable> with value "&#0;" ■ Java heap error on Service Oriented Architecture Suite, V10.1.3.1 release on Linux. ■ Invoking PL/SQL procedure with a large output parameter.
5931554	<p>Fixes problems that involve:</p> <ul style="list-style-type: none"> ■ Cross-reference feature ■ XPATH function, LOOKUP-DVM, but does not work in assign activity of Business Processes Execution Language.

- 3 Apply each of these patches to your installation.
- 4 Refer to the ReadMe.txt in each patch for guidance on how to apply the patch.

Installing and Deploying Siebel CRM On Demand Integration Pack for Oracle E-Business Suite

To extract the integration files, complete the following procedure.

To deploy the integration on SOA Suite

- 1 Unzip file Fmw_apr07_rup.zip under <SOA Suite Home>/BPEL directory (this directory is created during the SOA Suite Installation.)
Unzipping extracts a copy of this ReadMe file and SEBLODIntegPKEBS.zip that contains the integration files.
- 2 Unzip SEBLODIntegPKEBS.zip. Unzipping extracts the integration files into a new directory named:
SEBLODIntegPKEBS.

Configuring Components

This section covers the configuration of components. These tasks must be completed in the specific order listed:

- 1 [Locating Integration Files on page 22](#)
- 2 [Configuring and Deploying Common Schema on page 23](#)
- 3 [Configuring the Domain Value Maps on page 24](#)
- 4 [Configuring the Error Logging Database on page 25](#)

- 5 [Configuring Siebel CRM On Demand Session Pooling on page 26](#)
- 6 [Creating Oracle E-Business Suite Connection Information on page 27](#)
- 7 [Creating OracleCRMDataSource on page 28](#)
- 8 [Creating Error Database Connection Information on page 29](#)
- 9 [Creating J2EE Data Sources on page 29](#)
- 10 [Creating Adapter Data Sources on page 31](#)
- 11 [Preparing Business Processes Execution Language Processes for Deployment on page 32](#)
- 12 [Deploying the Business Processes Execution Language Processes Using Automatic Process Deployment on page 33](#)
- 13 [Configuring the Servers Using JDeveloper for Manual Process Deployment on page 35](#)
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Locating Integration Files

The integration files are contained in the SEBLODIntegPKEBS directory. This directory was created when you unzipped SEBLODIntegPKEBS.zip according to the instructions in the *Siebel CRM On Demand Integration Pack Quick Installation Guide*.

The SEBLODIntegPKEBS directory contains the following directories:

- **BulkDataLoad.** Has content for performing an initial data load of customer and product data from Oracle E-Business Suite to Siebel CRM On Demand, if necessary.
- **BusinessProcesses.** Has content for ongoing synchronization. These are the Oracle Business Processes Execution Language (BPEL) processes and related content.
- **SetUp.** Contains setup content for BPEL Processes.
- **SharedComponents.** Has shared components for BPEL Processes.

You need these directories and their files to complete the remaining installation and configuration tasks.

Configuring and Deploying Common Schema

To configure the common schema use the following procedure. [Table 5](#) shows the parameters being used and their purpose.

Table 5. CRM On Demand Session Parameters

Parameter	Purpose
<jdbc.url>	The URL of the database used by BPEL installation.
<olite.user>	The user name for the database used by BPEL installation.
<olite.password>	The corresponding password for <olite.user>.
<od.username>	Your Siebel CRM On Demand administration user name.
<od.password>	The corresponding password for <od.username>.
<ProxyHost>	The URL for the Proxy host where the proxy server is running.
<session.timeout>	The time out value for a session.
<session.badDue>	
<od.webservice.endpoint>	
<ProxyPort>	The port number for Proxy port.
<max.session.size>	The number of Siebel CRM On Demand sessions to be pooled in SOA Server. A suggested value is 5.

To configure CRM On Demand session parameters

- 1 Create a CRM On Demand Session parameter table:

```
create table od_sessionparam (Name varchar(1024) NULL, Value varchar(1024) NULL)
```

- 2 Seed the CRM On Demand Session Parameter table with the following configuration parameters:

```
insert into od_sessionparam (Name, Value) Values (' od. password', '<odpassword>')
insert into od_sessionparam (Name, Value) Values (' od. username', '<odusername>')
insert into od_sessionparam (Name, Value) Values (' max. sessi on. si ze', '3')
insert into od_sessionparam (Name, Value) Values (' sessi on. ti meout', '5')
insert into od_sessionparam (Name, Value) Values (' sessi on. badDue', '10')
insert into od_sessionparam (Name, Value) Values (' ProxyHost', '<proxyhost>')
insert into od_sessionparam (Name, Value) Values (' ProxyPort', '<proxyport>')
insert into od_sessionparam (Name, Value) Values (' QueryPageSi ze', '100')
insert into od_sessionparam (Name, Value) Values
(' Confi gTabl e', 'ORABPEL. OD_CONFIG')
insert into od_sessionparam (Name, Value) Values (' od. webservi ce. endpoi nt', '<CRMOD
Server URL>/Servi ces/I ntegrati on')
insert into od_sessionparam (Name, Value) Values (' AccountDetai l', '<CRMOD Server
URL>/OnDemand/user/
AccountDetai l?OMRET0=%2fOnDemand%2fuser%2fAccountHomePage&OMTHD=AccountDetai l Nav&O
MTG
T=AccountDetai l Form&AccountDetai l Form. Id=[%%AccountI d%%]&ocTi tleFi el d=Name&ocEdi t=
```

```

Y')
insert into od_sessionparam (Name, Value) Values ('ContactDetail', '<CRMOD Server
URL>/OnDemand/user/
ContactDetail?OMTGT=ContactDetailForm&OMTHD=ContactDetailNav&OMRET0=ContactHomePag
e&ContactDetailForm.Id=[%%ContactId%%]&ocTitleField=Name&ocTitle=Name&ocEdit=Y')
insert into od_sessionparam (Name, Value) Values ('OpportunityDetail', '<CRMOD Server
URL>/OnDemand/user/
OpportunityDetail?OMRET0=%%2fOnDemand%2fuser%2fOpportunityHomePage&OMTHD=Opportuni
tyDe
tailNav&OMTGT=OpportunityDetailForm&OpportunityDetailForm.Id=[%%OpportunityId%%]&oc
TitleField=Name&ocEdit=Y')
insert into od_sessionparam (Name, Value) Values ('LeadDetail', '<CRMOD Server URL>/
OnDemand/user/
LeadsDetailPage?OMTGT=LeadDetailForm&OMTHD=LeadDetailNav&OMRET0=LeadsHomepage&Lead
DetailForm.Id=[%%LeadId%%]&ocTitleField=Name&ocEdit=Y')

```

3 Restart the SOA Suite server.

4 To verify, make sure that the following URL shows an XML file:

```

http(s)://[SOA_HOST]:[PORT]/orabpel/xml/lib/SEBLODIntegPkEBS/
CRMIIntegSEBLODSchema.xsd

```

Configuring the Domain Value Maps

A sample Domain Value Map (DVM) is provided as an XML file conforming to the Oracle SOA Suite DVM schema. Use ESB administration to import the XML file. You can then modify it as needed by adding additional rows, but do not change the following:

- The DVM name
- Column names
- The number of columns

The following DVMs are used in the customer integration:

- **STATE or PROVINCE in EBS.** In Oracle E-Business Suite there are two properties captured for an address (HZ_LOCATION). STATE or PROVINCE. For each country only one property needs to be used. For the US, this DVM is not used, instead the STATE property is used. For other countries the default is PROVINCE. Each row has a two-digit country code (for example: US) and a corresponding property preference (for example: STATE). Its XML filename can be located at:

```

/SEBLODIntegPkEBS/SharedComponents/Utility/DVM/Maps/STATE or PROVINCE in EBS.xml

```

- **County Code Mapping between Oracle E-Business Suite and Siebel CRM On Demand.** Oracle E-Business Suite uses two character country codes, but Siebel CRM On Demand uses the entire name of the country. To compensate for this difference, this mapping file is used to look up the corresponding Siebel CRM On Demand country code when synchronizing account and contact records. Its XML filename can be located at:

```

/SEBLODIntegPkEBS/SharedComponents/Utility/DVM/Maps/
CRMIIntegSEBLODCountryISOcodes.xml

```

To configure the domain value map

- 1 From the Oracle SOA Suite main page ([http\(s\)://\[SOA HOST\]:\[PORT\]/](http(s)://[SOA HOST]:[PORT]/)) click on the ESB Control link.
- 2 Log in with an administrative user name.
- 3 Click the DVM icon.
- 4 Choose Create > Import New Map
- 5 Select the following file and click OK.
/SEBLODI ntegPkEBS/SharedComponents/Uti l i ty/DVM/Maps/STATE or PROVINCE i n EBS.xml
- 6 This creates a domain value map named STATE or PROVINCE in EBS.
- 7 Choose Create > Import New Map.
- 8 Select the following file and click OK.
/SEBLODI ntegPkEBS/SharedComponents/Uti l i ty/DVM/Maps/
CRMI ntegSEBLODCountryI SOCodes.xml

This creates a domain value map named CRMIntegSEBLODCountryISOcodes.

The above steps establish the default domain value maps. Update these to reflect the actual values in your Oracle E-Business Suite and Siebel CRM On Demand instances.

Configuring the Error Logging Database

The Siebel CRM On Demand Integration Pack for Oracle E-Business Suite needs an error logging database.

To configure the database

- 1 Decide on a password for the ERRORADMIN account and substitute it for the <PASSWORD> variable in the following step.
- 2 Create the following user:


```
CREATE USER ERRORADMIN
  IDENTIFIED BY VALUES ' <PASSWORD>'
  DEFAULT TABLESPACE ERRORHANDLING
  TEMPORARY TABLESPACE TEMP
  PROFILE DEFAULT
  ACCOUNT UNLOCK;
```
- 3 Grant the following user privileges:


```
GRANT ALTER ANY TABLE TO ERRORADMIN;
GRANT ALTER ANY TYPE TO ERRORADMIN;
GRANT CREATE SESSION TO ERRORADMIN;
GRANT CREATE SYNONYM TO ERRORADMIN;
GRANT CREATE ANY TABLE TO ERRORADMIN;
GRANT CREATE ANY TYPE TO ERRORADMIN;
```

```
GRANT DROP ANY TABLE TO ERRORADMIN;
GRANT UNLIMITED TABLESPACE TO ERRORADMIN;
GRANT INSERT ANY TABLE TO ERRORADMIN;
GRANT SELECT ANY TABLE TO ERRORADMIN;
GRANT UPDATE ANY TABLE TO ERRORADMIN;
```

- 4 Create the ERROR_DATABASE table in the ERRORADMIN schema.

```
CREATE TABLE ERROR_DATABASE
(
  CALLINGPROCESSNAME      VARCHAR2(60 BYTE),
  CALLINGPROCESSINSTANCEID VARCHAR2(10 BYTE),
  FAULTTEXT                VARCHAR2(1000 BYTE),
  FAULTSTACK               VARCHAR2(1000 BYTE),
  FAULTCONTEXT             VARCHAR2(200 BYTE),
  PROCESSINPUTPAYLOAD      CLOB
);
```

Configuring Siebel CRM On Demand Session Pooling

For the best performance, Siebel CRM On Demand sessions need to be cached in an SOA middle tier. Cached sessions need to be pooled across BPEL processes. Perform the following setup on the Oracle Database used by BPEL Process manager.

To configure the Siebel CRM On Demand session pooling table

- 1 Using the <olite.user>, <olite.password>, and <JDBC.URL> specified in CRMIntegSEBLODConfig.xml, create the following table and insert the following rows (currently there are five rows assuming that <max.session.size> is set to 5 in CRMIntegSEBLODConfig.xml. If there are more than five, insert additional rows, with each row having a unique SESSION_NUM value.)

```
CREATE TABLE OD_POOL
(SESSION_NUM int NOT NULL,
 SESSION_ID char(255) NULL,
 IS_LOCKED char(10) NOT NULL,
 LAST_RELEASED timestamp NULL,
 LAST_LOCKED timestamp NULL);

INSERT INTO OD_POOL(SESSION_NUM, SESSION_ID, IS_LOCKED, LAST_RELEASED,
LAST_LOCKED) VALUES(1, null, 'N', null, null);

INSERT INTO OD_POOL(SESSION_NUM, SESSION_ID, IS_LOCKED, LAST_RELEASED,
LAST_LOCKED) VALUES(2, null, 'N', null, null);

INSERT INTO OD_POOL(SESSION_NUM, SESSION_ID, IS_LOCKED, LAST_RELEASED,
LAST_LOCKED) VALUES(3, null, 'N', null, null);

INSERT INTO OD_POOL(SESSION_NUM, SESSION_ID, IS_LOCKED, LAST_RELEASED,
LAST_LOCKED) VALUES(4, null, 'N', null, null);
```

```

INSERT INTO OD_POOL (SESSION_NUM, SESSION_ID, IS_LOCKED, LAST_RELEASED,
LAST_LOCKED) VALUES (5, null, 'N', null, null);

CREATE TABLE OD_CONFIG
(NAME varchar(255) NULL,
VALUE varchar(255) NULL);
INSERT INTO OD_CONFIG (NAME, VALUE) VALUES ('PollingStatus', 'Polling');
INSERT INTO OD_CONFIG (NAME, VALUE) VALUES ('MaximumPollingWindowSize', '3600');

```

Creating Oracle E-Business Suite Connection Information

To create Oracle E-Business Suite connections, use the following procedure.

To configure Oracle E-Business Suite connection information

- 1** From the Oracle SOA Suite main page click the link for Application Server Control.
- 2** Log in as an administrative user.
- 3** Under All Application Servers, click on the SOA application server name.
- 4** Click on the OC4J J2EE container name.
- 5** Click Administration tab.
- 6** Navigate to Administration Tasks > Services > JDBC Resources, and then click Go to Task.
- 7** Under Connection Pools, click Create.
- 8** From the Application picklist, choose the appropriate domain (for example: default).
- 9** Under Connection Pool Type, choose New Connection Pool.
- 10** Click Continue.
- 11** Enter this name: OracleEBSDataSource
- 12** Under URL, click on JDBC URL and enter appropriate host:port:service name. For example: jdbc:oracle:thin:@<EBS Server URL>:<Port>:<ServiceName>
- 13** Under Credentials, enter an E-Business Suite username and password that has APPS schema privilege (for example, APPS/APPS.)
- 14** Click Finish.
- 15** Test the connection by clicking Test Connection for the OracleEBSDataSource you created.
- 16** Click Test.

If successful, a confirmation message appears.

Creating OracleCRMODDataSource

To create OracleCRMODDataSource, use the following procedure.

To create OracleCRMODDataSource

- 1 From the Oracle SOA Suite main page click the link for Application Server Control.
- 2 Log in as an administrative user.
- 3 Under All Application Servers, click the SOA application server name.
- 4 Click the OC4J J2EE container name.
- 5 Click the Administration tab.
- 6 Navigate to Administration Tasks > Services > JDBC Resources, and then click Go to Task.
- 7 Under Connection Pools, click Create.
- 8 From the Application picklist, choose the appropriate domain (for example: default).
- 9 Under Connection Pool Type, choose New Connection Pool.
- 10 Click Continue.
- 11 Enter this name:
Orac l eCRMODDataSource
- 12 Under URL, click on JDBC URL and enter appropriate host:port:service name. For example:
j dbc: oracl e: thi n: @exampl e. com: <Port>: exampl eI nstance
- 13 Under Credentials, enter the appropriate error database JDBC URL username and password.
- 14 Click Attributes.
- 15 Specify the following attribute values:
 - Initial size of Connection Cache: 5
 - Minimum number of connections: 5
 - Maximum number of connections: -1
 - Connection Retry Interval (seconds): 1
- 16 For the remaining e attributes, accept the default values.
- 17 Click Finish.
- 18 Test the connection by clicking Test Connection for the OracleCRMODDataSource you created.
- 19 Click Test.
If successful, a confirmation message appears.

Creating Error Database Connection Information

To create error database connections, use the following procedure.

To configure error database connection information

- 1 From the Oracle SOA Suite main page click the link for Application Server Control.
- 2 Log in as an administrative user.
- 3 Under All Application Servers, click on the SOA application server name.
- 4 Click on the OC4J J2EE container name.
- 5 Click Administration tab.
- 6 Navigate to Administration Tasks > Services > JDBC Resources, and then click Go to Task.
- 7 Under Connection Pools, click Create.
- 8 From the Application picklist, choose the appropriate domain (for example: default).
- 9 Under Connection Pool Type, choose New Connection Pool.
- 10 Click Continue.
- 11 Enter this name: ErrorDB
- 12 Under URL, click on JDBC URL and enter appropriate host:port:service name. For example:
jdbc:oracle:thin:@<EBS Server URL>:<Port>:<ServiceName>
- 13 Under Credentials, enter the appropriate error database JDBC URL username and password.
- 14 Click Finish.
- 15 Test the connection by clicking Test Connection for the ErrorDB you created.
- 16 Click Test.

If successful, a confirmation message appears.

Creating J2EE Data Sources

To create J2EE data sources, use the following procedure.

To create J2EE data sources

- 1 Create the following data sources:
 - jdbc/OracleEBSDataSource
 - loc/OracleCRMODDataSource
 - loc/OracleEBSDataSource
 - jdbc/ErrorDB
 - loc/ErrorDB

- 2 Create jdbc/OracleEBSDataSource
 - a Under Data Sources, click Create.
 - b Under Application, choose an appropriate domain name from the pick list.
 - c Under Data Type Source, select Managed Data Source.
 - d Click Continue.
 - e Enter this name: jdbcOracleEBSDataSource.
 - f Enter this location: jdbc/OracleEBSDataSource.
 - g Pick Transaction level: Global &Local Transactions.
 - h Pick Connection Pool: OracleEBSDataSource.
 - i Click Finish.
- 3 Create loc/OracleEBSDataSource.
 - a Follow the steps above, except:
 - b Enter name: locOracleEBSDataSource.
 - c Enter location: loc/OracleEBSDataSource.
 - d Pick Transaction level: Local Transactions Only.
- 4 Create jdbc/ErrorDB.
 - a Follow the steps above, except:
 - b Enter name: jdbcErrorDB.
 - c Enter location: jdbc/ErrorDB.
 - d Pick Transaction level: Global &Local Transactions.
 - e Pick Connection Pool: ErrorDB.
- 5 Create loc/ErrorDB.
- 6 Follow the steps above, except:
 - a Enter name: locErrorDB.
 - b Enter location: loc/ErrorDB.
 - c Pick Transaction level: Local Transactions Only.
 - d Pick Connection Pool: ErrorDB.
- 7 Create loc/OracleCRMODDataSource
 - a Under Data Sources, click Create.
 - b Under Application, choose an appropriate domain name from the pick list.
 - c Under Data Type Source, select Managed Data Source.
 - d Click Continue.
 - e Enter this name: locOracleCRMODDataSource.

- f** Enter this location: loc/OracleCRMODDataSource.
- g** Pick Transaction level: Local Transactions Only.
- h** Pick Connection Pool: OracleCRMODDataSource.
- i** Click Finish.

Creating Adapter Data Sources

The Siebel CRM On Demand Integration Pack for Oracle E-Business Suite needs data sources for the adapters.

To create adapter data sources

- 1** From the Oracle SOA Suite main page click link for Application Server Control.
- 2** Log in as an administrative user.
- 3** Under All Application Servers, click on your SOA application server name.
- 4** Click on your OC4J J2EE container name.
- 5** Click Applications tab.
- 6** Click domain name.
- 7** Configure AppsAdapter
 - a** Click AppsAdapter module.
 - b** Click Connection Factories
 - c** Click Create above JNDI Location.
 - d** Leave default for Connection Factory Interface and Click Continue.
 - e** For JNDI location enter: eis/Apps/OracleEBSDDataSource.
 - f** Under Connection Pooling select No Connection Pool.
 - g** Under Configuration Properties, enter dataSource as loc/OracleEBSDDataSource and xDataSource as jdbc/OracleEBSDDataSource.
 - h** Click Finish.
- 8** Configure AQ Adapter
 - a** Click AqAdapter module.
 - b** Click Connection Factories
 - c** Click Create above JNDI Location.
 - d** Leave default for Connection Factory Interface and Click Continue.
 - e** For JNDI location enter: eis/AQ/OracleEBSDDataSource.
 - f** Under Connection Pooling select No Connection Pool.

- g Under Configuration Properties, enter dataSource as loc/OracleEBSDataSource and xADataSource as jdbc/OracleEBSDataSource.
- h Click Finish.
- 9 Configure DB Adapter
 - a Click DbAdapter module.
 - b Click Connection Factories
 - c Click Create above JNDI Location.
 - d Leave default for Connection Factory Interface and Click Continue.
 - e For JNDI location enter: eis/DB/OracleEBSDataSource.
 - f Under Connection Pooling select No Connection Pool.
 - g Under Configuration Properties, enter dataSource as loc/OracleEBSDataSource and xADataSource as jdbc/OracleEBSDataSource.
 - h Click Finish.
 - i Click Create above JNDI Location.
 - j Leave default for Connection Factory Interface and Click Continue.
 - k For JNDI location enter eis/DB/ErrorDB.
 - l Under Connection Pooling, select No Connection Pool.
 - m Under Configuration Properties, enter dataSource as loc/ErrorDB and xADataSource as jdbc/ErrorDB.
 - n Click Finish.

Preparing Business Processes Execution Language Processes for Deployment

Before you can deploy the BPEL process, you must complete some preparation steps.

To prepare Business Processes Execution Language processes

- 1 Locate the following file and open it for editing:
/SEBLODI ntegPkEBS\SetUp\CRMI ntegProcessParameters.xml
- 2 Edit the following parameters.
 - a Change PARAMVALUE for PARAMNAME "http://127.0.0.1:8888/orabpel/default" to:
http(s)://[YOUR HOST NAME]: [YOUR PORT NUMBER]/orabpel/[YOUR BPEL DOMAIN NAME]
 - b Change PARAMVALUE for PARAMNAME "http://127.0.0.1:8888/orabpel/xmllib" to:
http(s)://[YOUR HOST NAME]: [YOUR PORT NUMBER]/orabpel/xmllib

- 3 Go to \SEBLODIIntegPkEBS\SetUp\scripts and run the following command to update the BPEL processes with the values specified in CRMIntegProcessParameters.xml.

```
java -jar EditParam.jar -i <Project Root> -f <CRMIntegProcessParameters.xml Location> -verbose -t D:/temp
```

For example:

```
java -jar EditParam.jar -i d:/SEBLODIIntegPkEBS/BusinessProcesses -f d:/SEBLODIIntegPkEBS/Setup/CRMIntegProcessParameters.xml -verbose -t D:/temp
```

NOTE: To run EditParam.jar, you need Java Development Kit version 1.4 or newer installed.

- 4 Copy the contents of \SEBLODIIntegPkEBS\BusinessProcesses\Utilities\classes from the build to //<SOA Server>/bpel/system/classes.
- 5 Restart the SOA Server:
 - a Log in to <SOA Server>/em.
 - b Select the SOA Instance.
 - c Click Restart.
 - d Click Yes on the next two confirmation messages.
 - e Wait until you get a successful restart response message from the SOA Server.

Deploying the Business Processes Execution Language Processes Using Automatic Process Deployment

The Siebel CRM On Demand Integration Pack for Oracle E-Business Suite may either be deployed manually or with an automated deployment script. For information on deploying manually, read [Configuring the Servers Using JDeveloper for Manual Process Deployment on page 35](#).

If you choose automatic deployment, there are two slightly different procedures: one for deploying the Siebel CRM On Demand Integration Pack for Oracle E-Business Suite BPEL processes for the first time, and one for updating an existing installation of Siebel CRM On Demand Integration Pack for Oracle E-Business Suite processes.

To deploy BPEL processes for the first time

NOTE: This procedure is for the automatic deployment of the BPEL processes assuming no previous processes have been deployed for the integration on the SOA server.

- 1 Make sure that the \SEBLODIIntegPkEBS folder is on the same machine where the BPEL processes are to be deployed.

If the folder is not already there, move it to a middle-tier machine after running the EditParam.jar and executing the previous procedures. The \SEBLODIIntegPkEBS folder should be copied under <SOA HOME>\bpel\samples directory.

- 2 From a command prompt, run this command:
 - a For Windows:

```
<SOA_HOME>\bpel\bin\devprompt.bat
```

b For Linux:

```
<SOA_HOME>\bpel\bin\devprompt.sh
```

- 3** Navigate to SEBLODIntegPkeBS\BusinessProcesses and run this command:
ant
- 4** Ignore warnings, if any, while the script is running.
- 5** Restart the SOA Server.
- 6** Restart the polling process. For more information, read [Starting the CRMIntegSEBLODPollingSchedulerAsync Process on page 40](#).

To update BPEL processes in an existing implementation

NOTE: This procedure is for the automatic deployment of the BPEL processes where processes from an existing or new implementation have been deployed for the integration on the SOA server.

- 1** Restart the SOA Server.
- 2** Make sure that the \SEBLODIntegPkeBS folder is on the same machine where BPEL Processes are to be deployed.

If the folder is not already there, move it to a middle-tier machine after running the EditParam.jar and executing all the previous procedures. The \SEBLODIntegPkeBS folder should be copied under <SOA_HOME>\bpel\samples directory.
- 3** From a command prompt, run this command:

```
<SOA_HOME>\bpel\bin\devprompt.sh
```
- 4** Navigate to SEBLODIntegPkeBS\BusinessProcesses and run this command:
ant
- 5** Ignore warnings, if any, while the script is running.
- 6** Clear the WSDL cache on the SOA Server:
 - a** Go to the BPEL Console.
 - b** Click the BPEL Processes tab.
 - c** Click Clear WSDL Cache.
- 7** Restart the SOA Server.
- 8** Restart the polling process. For more information, read [Starting the CRMIntegSEBLODPollingSchedulerAsync Process on page 40](#).

Configuring the Servers Using JDeveloper for Manual Process Deployment

Before you can manually deploy the BPEL processes, you must first configure the application server and the integration server. Do not use this procedure if you have used automatic deployment as described in [Deploying the Business Processes Execution Language Processes Using Automatic Process Deployment on page 33](#).

To configure the external jar - CRMODSessionParam.jar

- 1 Close all open instances of JDEVELOPER.
- 2 Copy the jar file located under this folder:
`\SEBLODI ntegPkEBS\Busi nessProcesses\Uti l i t i e s\di st`
to:
`<JDEV Instal l folder>/Jdev/li b/ext`

To configure the application server

- 1 Open Oracle JDeveloper.
- 2 Click Connections Navigator.
- 3 Under Connections, double-click on Application Server.
- 4 Click Next.
- 5 Enter a name for ConnectionName to represent the SOA Suite application server.
- 6 From Connection Type, select Oracle Application Server 10g 10.1.3.
- 7 Click Next.
- 8 For UserName, enter the SOA instance username.
- 9 For Password, enter the SOA instance password.
- 10 Select Deploy Password.
- 11 Click Next
- 12 For Hostname, enter the server on which the SOA instance is runs.
- 13 For OPMN Port, leave the default.
- 14 For OC4J Instance Name, enter the OC4J instance name given during the installation.
- 15 Click Next.
- 16 Click Test Connection.

If successful, a confirmation message appears.

To configure the integration server

- 1 Open Oracle JDeveloper.
- 2 Click Connections Navigator.
- 3 Under Connections, double-click on Integration Server.
- 4 Click Next.
- 5 Enter a name for ConnectionName to represent the SOA Suite application server.
- 6 Click Next.
- 7 Under Application Server, select the server created in the previous step.
- 8 Change the port name, as needed, to indicate the port at which SOA Suite instance runs.
- 9 Click Next.
- 10 Click Test Connection.

If successful, a confirmation message appears.

Deploying the Business Processes Execution Language Processes Manually

Use the following procedure to deploy the BPEL processes manually. Do not use this procedure if you have used automatic deployment as described in [Deploying the Business Processes Execution Language Processes Using Automatic Process Deployment on page 33](#).

To deploy Business Processes Execution Language processes

- 1 In JDeveloper, use File > Open to open SEBLODIntegPKEBS/BusinessProcesses/ODSProject.jws
This opens a workspace named ODSProject, which contains the BPEL processes.
- 2 Right-click on ODSProject, and choose Add to ODSProject.jws
- 3 Browse to SEBLODIntegPKEBS/BusinessProcesses/SEBLOD/CRMIntegRemoveContactSEBLODSync.
- 4 Select CRMIntegRemoveContactSEBLODSync.jpr
- 5 Click Open.
This brings one additional process into the workspace.
- 6 For each of the following projects compile the Java code by right-clicking each project name and choosing Make:
 - CRMIntegSEBLODGetSession
 - CRMIntegSEBLODPollingSchedulerAsync
 - CRMIntegSEBLODReleaseSession
- 7 Ignore the warnings listed on the build output window.

- 8 For each process in [Table 6](#), complete the following steps to compile and deploy.
- a Right-click on the process name, and choose Deploy > <IntegrationServerName> > Deploy to your specified domain.
 - b Ignore any warnings listed on the Compiler tab.
 - c Check Apache Ant tab for deployment status.

NOTE: These processes must be deployed in the order listed in [Table 6](#).

Table 6. Deployment Order of BPEL Processes

Order	Process Name
1	CRMIntegSEBLODGetSession
2	CRMIntegSEBLODReleaseSession
3	CRMIntegErrorHandlerService
4	CRMIntegXformEBS11i10OrgToSEBLOD11Account
5	CRMIntegXformSEBLOD11AccountToEBS11i10Org
6	CRMIntegUpdateOrgEBS11i10Sync
7	CRMIntegUpdateOrgSEBLOD11ToEBS11i10Async
8	CRMIntegXformProductODOraToComEBS11i10ToSEBL782
9	CRMIntegProductUpsertInterface
10	CRMIntegProductUpsertEBS11iToSEBLODAsync
11	CRMIntegSEBLODContactInterfaceSync
12	CRMIntegSEBLODContactValidator
13	CRMIntegSEBLODAccountInterfaceSync
14	CRMIntegSEBLODAccountValidator
15	CRMIntegSEBLODPollUpdatedAccountsAsync
16	CRMIntegSEBLODPollUpdatedContactsAsync
17	CRMIntegSEBLODTimeInterfaceSync
18	CRMIntegSEBLODUserInterfaceSync
19	CRMIntegSEBLODPollingSchedulerAsync
20	CRMIntegAccountLookupEBS11i10toSEBLODSync
21	CRMIntegContactLookupEBS11i10ToSEBLODSync
22	CRMIntegContactUpsertEBS11i10ToSEBLODSync
23	CRMIntegAccountUpsertEBS11i10ToSEBLODSync
24	CRMIntegCreateActEBS11i10ToSEBLOD11Async

Table 6. Deployment Order of BPEL Processes

Order	Process Name
25	CRMIntegCreateContSEBLOD11ToEBS11i10Sync
26	CRMIntegSEBLOD OpportunityInterfaceAsync
27	CRMIntegSEBLODLeadInterfaceAsync
28	CRMIntegLeadUpsertEBS11i10ToSEBLODSync
29	CRMIntegOpportunityUpsertEBS11i10ToSEBLODSync
30	CRMIntegCreateOrgEBS11i10Sync
31	CRMIntegCreateOptySEBLOD11Sync
32	CRMIntegCreateOrgSEBLOD11ToEBS11i10Sync
33	CRMIntegOpportunityProductLineQueryEBS11i10toSEBLODSync
34	CRMIntegSyncProductEBS11i10ToSEBL782Async
35	CRMIntegSubscribeToBulkloadProductEBS11i10ToSEBL782
36	CRMIntegSubscribeToCreateProductEBS11i10ToSEBL782
37	CRMIntegSubscribeToUpdateProductEBS11i10ToSEBL782
38	CRMIntegUpdateActEBS11i10ToSEBLOD11Async
39	CRMIntegSEBLODActivityInterfaceSync
40	CRMIntegRemoveContactSEBLODSync
41	CRMIntegObjectMergeEBS11i10ToSEBLODSync
42	CRMIntegMergePartyEBS11i10ToSEBLOD11Async

Setting Business Processes Execution Language Options

BPEL needs these specific settings for this integration.

To set time out values

- 1 From the Oracle SOA Suite main page click the link for BPEL Control.
- 2 Log in as an administrative user.
- 3 Click Manage BPEL Domain
- 4 Set syncMaxWaitTime to 300.
- 5 Open the following file for editing:

```
<SOA_HOME>/j2ee/<domain>/application-deployments/orabpel/ejb_ob_engine/orion-ejb-jar.xml
```

- 6 Find the transaction-timeout for the CubeEngineBean element and set its value to 120.
- 7 Save the file.
- 8 Restart the SOA application server.

Setting Service Oriented Architecture Suite Proxy Server Properties

If the SOA server where the BPEL processes are deployed is behind a proxy server, then you must specify the proxy server information.

To set the Service Oriented Architecture Suite proxy server properties

- 1 From the Oracle SOA Suite main page click the link for Application Server Control.
- 2 Log in as an administrative user.
- 3 Under All Application Servers, click on your SOA application server name.
- 4 Click on your OC4J J2EE container name.
- 5 Click Administration tab.
- 6 Click Server Properties under Administration Tasks > Properties.
- 7 Add the following properties, adjusting the property values to suit your installation:
 - -Dhttp.proxySet=true
 - -Dhttp.useProxy=true
 - -Dhttp.proxyHost=www.example.com
 - -Dhttp.proxyPort=80
 - -Dhttp.nonProxyHosts=*example.com
- 8 Remove any duplicates of the above

Finding Business Processes Execution Language Endpoint URLs for E-Business Suite Profiles

When you set up profiles in Oracle E-Business Suite for this integration, you need to provide BPEL endpoint URLs. Follow these steps to find that information.

To find Business Processes Execution Language endpoint URLs

- 1 From the Oracle SOA Suite main page click the link for BPEL Control.
- 2 Log in as an administrative user.
- 3 For a process, click the WSDL tab to find endpoint location.

- 4 Use these values to set the appropriate profile options in Oracle E-Business Suite.

Starting the CRMIntegSEBLODPollingSchedulerAsync Process

To start the polling process, complete the following task.

To start the CRMIntegSEBLODPollingSchedulerAsync process

- 1 From the Oracle SOA Suite main page click the link for BPEL Control.
- 2 Log in as an administrative user.
- 3 Click BPEL Processes tab.
- 4 Click CRMIntegSEBLODPollingSchedulerAsync process.
- 5 Click Initiate to start this process.
- 6 Provide the following values to the process:
 - Unit = S (for seconds)
 - Frequency = 3600 (for one hour)
 - WindowStart = (leave this blank to force polling to pick up from where it left off)
- 7 Click Post XML Message.
- 8 Click the Instances tab to check if the instances are getting polled.

Purging Process Instances on the Business Processes Execution Language Console

As a monthly maintenance measure you can purge the process instances.

To purge process instances on the Business Processes Execution Language console

- 1 From the Oracle SOA Suite main page click the link for BPEL Control.
 - 2 Log in as an administrative user.
 - 3 Click Instances tab.
 - 4 Click Purge All Instances.
 - 5 Click Delete All Instances.
 - 6 In the warning message, click Delete All Instances.
- This step stops the Siebel CRM On Demand Polling process. When purging is complete, restart the CRMIntegSEBLODPollingSchedulerAsync process.

Process of Configuring the Oracle E-Business Suite Environment

To configure the Oracle E-Business Suite environment, perform the following configuration tasks:

- [Configuring Oracle Warehouse Builder on page 41](#)
- [Configuring Oracle Warehouse Builder for the Customer Integration on page 42](#)
- [Configuration Changes for Customer Data on page 44](#)
- [Configuring Changes for Product Data on page 46](#)
- [Configuring for Quoting Integration on page 47](#)

Configuring Oracle Warehouse Builder

This is a step in the [Process of Configuring the Oracle E-Business Suite Environment on page 41](#).

Oracle Warehouse Builder is an optional component, used to perform initial data synchronization from Oracle E-Business Suite to Siebel CRM On Demand, if customer or product data already exists in Oracle E-Business Suite. If no bulk data loads are required, then you do not need to use Oracle Warehouse Builder. Use of Oracle Warehouse Builder for initial data synchronization requires the ETL and Data Quality options from Oracle Warehouse Builder. Oracle Warehouse Builder is not included in this bundle and, if needed, must be licensed separately.

Before configuring Oracle Warehouse Builder, make sure you have Oracle Warehouse Builder 10g Release 2 installed. Warehouse Builder 10g Release 2 (10.2) is supported and certified for use with the following releases of the Oracle database:

- Oracle9i Release 2 (9.2.x, patched to the latest version) Enterprise Edition
- Oracle Database 10g Enterprise Edition R1 (10.1.x)
- Oracle Database 10g Standard Edition R2 (10.2.x)
- Oracle Database 10g Enterprise Edition R2 (10.2.x)

To configure Oracle Warehouse Builder

- 1 Install the Oracle Warehouse Builder repository on the Oracle database.
- 2 Make sure that the database character set is compatible with the character set of the Oracle E-Business Suite database.

Normally, the Oracle E-Business Suite database has the UTF8 character set. In this case, the character set of the Oracle Warehouse Builder repository database is UTF8 or AL32UTF8. [Table 1 on page 15](#) lists the complete mapping between Siebel CRM On Demand supported language and the Oracle database character set.

NOTE: Do not use Excel to edit CSV files generated by Oracle Warehouse Builder, because it might create difficulties that relate to the character sets.

- 3 Start Design Center.

- 4 Choose Advanced setup.
- 5 Enter the connection information (system password, host name, port, and so on).
- 6 Choose Manage Repository Owner.
- 7 In the resulting dialog box, select the check box, Skip check box, and click OK.
- 8 Select the option, Create new Oracle Warehouse Builder Repository owner.
- 9 Enter a username and password.

The Oracle Warehouse Builder Repository Owner user is required to start and stop the Oracle Warehouse Builder Control Center. The Oracle Warehouse Builder Control Center must be running to be able to use Oracle Warehouse Builder.

- 10 Select the appropriate tablespaces, and click Next.
- 11 Click Create New User.
- 12 Enter the user information (user name, password, and so on)
- 13 Grant each user "select" access to v_\$parameter table. For example, "grant select on v_\$parameter to owbdpl".
You can create multiple Oracle Warehouse Builder repository users to access the same repository.
- 14 Connect to the Oracle Warehouse Builder Repository using the Oracle Warehouse Builder Design Center application (installed as part of the Oracle Warehouse Builder installation).

Configuring Oracle Warehouse Builder for the Customer Integration

This is a step in the [Process of Configuring the Oracle E-Business Suite Environment on page 41](#).

To configure Oracle Warehouse Builder for the Customer Integration

- 1 Make sure the Oracle EBS database user to be used for Customer Initial Load has appropriate database access granted as listed below.

Table or View Name	Access
EGO_ITEM_SYNC_V	Read
HZ_CONTACT_POINTS	Read
HZ_CUST_ACCOUNTS	Read
HZ_GEOGRAPHIES	Read
HZ_GEOGRAPHY_IDENTIFIERS	Read
HZ_LOCATIONS	Read
HZ_ORG_CONTACTS	Read

Table or View Name	Access
HZ_ORGANIZATION_PROFILES	Read
HZ_ORIG_SYS_REFERENCES	Read/Write
HZ_ORIG_SYSTEM_REF_S	Read
HZ_PARTIES	Read
HZ_PARTY_SITE_USES	Read
HZ_PARTY_SITES	Read
HZ_PERSON_PROFILES	Read
HZ_RELATIONSHIPS	Read

- 2 In the design center, navigate to Design > Import > Warehouse Builder Metadata, and import the file named, CRMINTG_XFER_ORGS_TO_OD.mdl.

This creates a project named, CRMINTG_XFER_ORGS_TO_OD.

- 3 In this project, choose Experts, and then CRMINTG_CUST_XFER_XPRT, DO_DEPLOY_AFTER_IMPORT.
- 4 To start the configuration and deployment of Oracle Warehouse Builder Design, right-click and then choose Start.
- 5 Complete the resulting prompts for implementation-specific information such as your Oracle E-Business Suite database, Oracle Warehouse Builder Repository database, and so on.

After successful completion, Oracle Warehouse Builder displays a confirmation message that contains the steps needed to export the data.

To configure Oracle Warehouse Builder for the Product Integration

- 1 In Design Center, navigate to Design > Import > Warehouse Builder Metadata, and import the file named, CRMINTEG_PRODUCT_LOAD_OD.mdl.

This creates a project named, CRMINTEG_PRODUCT_LOAD_OD.

- 2 In this project, choose Experts > CRMINTEG_PRODUCT_EXPERT_MODULE > CRMINTEG_PRODUCT_EXPERT.
- 3 To start the configuration and deployment of Oracle Warehouse Builder Design, right click and then choose Start.
- 4 Complete the resulting prompts for implementation-specific information, such as your Oracle E-Business Suite database, Oracle Warehouse Builder Repository database, and so on.
- 5 Close any windows opened as part of this procedure.

After successful completion, Oracle Warehouse Builder displays a confirmation message that contains the steps needed to export the data.

Configuration Changes for Customer Data

This is a step in the [Process of Configuring the Oracle E-Business Suite Environment on page 41](#).

The following configuration changes in Oracle E-Business Suite affect the customer data integration:

- [Users and Responsibilities on page 44](#)
- [Data Synchronization Profile Options on page 45](#)
- [Running the Concurrent Program on page 46](#)
- [Setting Up Data Quality Management Options on page 46](#)

Users and Responsibilities

Assign an existing Oracle HTML Quoting user the “Siebel CRM On Demand User” responsibility. Only this user is able to log in and access the custom UI pages that are invoked from Siebel CRM On Demand.

The set up for a quoting user is a prerequisite. For more information, see the appropriate sections of the Oracle E-Business Suite *Quoting Implementation Guide*.

Creating a Synchronization Account

This is a step in the [Process of Configuring the Oracle E-Business Suite Environment on page 41](#).

To perform synchronization of account, address, and contact information from Siebel CRM On Demand to Oracle E-Business Suite, a new user account is required on the Oracle E-Business Suite installation. Changes to data on Oracle E-Business Suite are performed using this new user account.

To create a synchronization account

- 1 Navigate to the System Administrator responsibility (Security > User > Define) in Oracle E-Business Suite.
- 2 Enter “User Name” = “ON_DEMAND_INT”
- 3 Specify a password for the synchronization account.
- 4 Assign the responsibility, Siebel CRM On Demand User, and save it.

Data Synchronization Profile Options

Table 7 lists the profile options and their appropriate levels that need to be set to enable data synchronization from Oracle E-Business Suite to Siebel CRM On Demand.

Table 7. Profile Options and Levels

Profile Name	Purpose	Value	Level
Siebel CRM On Demand Integration Account WSDL Location	New account custom UI calls BPEL process at this location.	Endpoint location for BPEL process CRMIntegCreateOrgSEBL OD11ToEBS11i10Sync	Site
Siebel CRM On Demand Integration Contact WSDL Location	New contact custom UI calls BPEL process at this location.	Endpoint location for BPEL process CRMIntegCreateContSEB LOD11ToEBS11i10Sync	Site
Siebel CRM On Demand Integration Lead WSDL Location	Converts Lead custom UI calls BPEL process at this location.	Endpoint location for BPEL process CRMIntegCreateOptySEB LOD11Sync	Site
HZ: Format Business Object Business Events as Bulk	For Data Synchronization from Oracle E-Business Suite to Siebel CRM On Demand.	No	Site
HZ: Execute API Callouts	For Data Synchronization from Oracle E-Business Suite to Siebel CRM On Demand.	All Events Enabled	Site
Oracle Applications Look and Feel	Sets the style sheet for a custom UI similar to Siebel CRM On Demand.	Siebel CRM On Demand Look and Feel	Responsibility: Siebel CRM On Demand User User: User created in 3.1.1.1
Siebel CRM On Demand Host Location	Used to build the Cancel button URL for custom pages.	A URL similar to: https://secure-ausomxafa.crmondemand.com Notice there is no "/" at the end.	Site

Running the Concurrent Program

To enable data synchronization from Oracle E-Business Suite to Siebel CRM On Demand, run the concurrent program named, TCA Business Object Events: Raise Events Program with the appropriate responsibility (for example, Trading Community Manager). This program raises Trading Community Architecture BES Events for Business Objects. It applies to Create and Updated to customer data in Oracle E-Business Suite. Schedule it for intervals that are appropriate to your customer data create and update volume.

Setting Up Data Quality Management Options

To prevent duplicate records from occurring, the Siebel CRM On Demand Integration Pack for Oracle E-Business Suite includes a Duplicate Prevention workflow. To set up the Data Quality Management (DQM) options, use the list in [Table 8](#). The values in this table are suggestions, you can modify them for your specific environment. For more information on these profiles and their values, see *DQM Administration Guide*.

Table 8. Data Quality Management Options

Profile Name	Purpose	Value	Level
HZ: Enable DQM Party Search	Required to Enable DQM	Yes	Responsibility: Siebel CRM On Demand User
HZ: Enable Duplicate Prevention at Party Creation	To enable duplication prevention at the time of party creation	Person and Organization	Responsibility: Siebel CRM On Demand User
HZ: Match Rule for Organization Duplicate Prevention	Match Rule to be used for Organization Duplicate Prevention	HZ_ORG_SIMPLE_SE ARCH_RULE	Responsibility: Siebel CRM On Demand User
HZ: Match Rule for Person Duplicate Prevention	Match Rule to be used for Person Duplicate Prevention	HZ_PERSON_SIMPLE _SEARCH_RULE	Responsibility: Siebel CRM On Demand User

Configuring Changes for Product Data

This is a step in the [Process of Configuring the Oracle E-Business Suite Environment on page 41](#).

To configure Oracle E-Business Suite for the product data synchronization, complete the following tasks:

- Assign the responsibility, Inventory, to each user.

- Verify that the BPEL processes for Product synchronization are deployed on the BPEL server. [Table 9](#) lists these processes.

Table 9. BPEL Processes for Product Synchronization

Process Name	Purpose
CRMIntegProductUpsertEBS11iToSEBL0DAsync	Transforms the product from the common object schema to the Siebel CRM On Demand Schema
CRMIntegProductUpsertInterface	Initiates the Siebel CRM On Demand Web service API
CRMIntegSubscribeToBulkloadProductEBS11i10ToSEBL782	Subscribes to oracle.apps.ego.item.postItemBulkload event and initiates the synchronization process
CRMIntegSubscribeToCreateProductEBS11i10ToSEBL782	Subscribes to oracle.apps.ego.item.postItemCreate event and initiates the synchronization process
CRMIntegSubscribeToUpdateProductEBS11i10ToSEBL782	Subscribes to oracle.apps.ego.item.postItemUpdate event and initiates the synchronization process
CRMIntegSyncProductEBS11i10ToSEBL782Async	Main Item Sync Process; This queries ego_item_sync_v and prepares a payload for On Demand (Master Items alone). This payload is transformed to CO schema. This payload is passed over to Siebel services for Siebel CRM On Demand.
CRMIntegXformProductODOraToComEBS11i10ToSEBL782	Transforms the payload from the Oracle schema to the common object schema

Configuring for Quoting Integration

To configure Oracle E-Business Suite for the Quoting Integration, complete these tasks:

- [Implementing the Siebel CRM On Demand Look-and-Feel on page 47](#)
- [ASO: Auto Account Creation Profile on page 48](#)
- [ASO: On Demand Integration URL Profile on page 48](#)
- [Preventing Navigation Issues on Quote Related Pages on page 49](#)

Implementing the Siebel CRM On Demand Look-and-Feel

Implementing the Siebel CRM On Demand Look-And-Feel is optional. It does not affect the ability to access the quote listing pages, it affects only how these pages render on the screen.

To enable the Siebel CRM On Demand look-and-feel on the related Oracle E-Business Suite quote listing pages, you must include the style classes defined in the following paragraph within a copy of the `jtfucss.css` style sheet that ships with the Oracle E-Business Suite (for example: `oducss.css`). These style classes must also be included in a copy of the `jtfucss_med.css` and `jtfucss_sml.css` (for example: `oducss_med.css` and `oducss_sml.css`). Set the profile `JTF_PROFILE_DEFAULT_CSS` to the newly copied style sheet (for example: `oducss.css`). For this change to take effect you must restart the Oracle E-Business Suite Middle Tier.

Make a copy of the original `jtfucss.css` file, rename the copied file and set the `JTF_PROFILE_DEFAULT_CSS` to the newly copied style sheet. This is preferable to directly modifying the `jtfucss.css` file directly, as changes are not preserved during patching or upgrades under this approach.

The style classes to be included in the copy of `jtfucss.css` are:

```
.SblTableTitleBar { background-color: #6689c2; font-family: tahoma, sans-serif;
font-size: 8pt; font-weight: bold; padding: 5px 10px 5px 10px; border: 1px solid;
border-color: #8ca6d1 #41639d #41639d #8ca6d1; color: #fff}

.SblTableAlphaFilterBar{background-color: #b2c2df; font-family: tahoma, sans-serif;
font-size: 8pt; padding: 1px 5px 1px 5px}

.SblTableHeaderCell { background-color: #ced4dd; font-family: tahoma, sans-serif;
font-size: 8pt; font-weight: bold; line-height: 12pt; padding: 1px 5px 1px 5px; text-align: left; white-space: wrap }

.SblTableDataCell { background-color: #f7f7e7; font-family: tahoma, sans-serif;
font-size: 8pt; padding: 1px 5px 1px 5px; text-align: left }

.SblPageTitle { font-family: tahoma, sans-serif; display: inline; font-size: 11pt;
font-weight: bold; margin: 0 10px 0 2px}

.SblTableRecordNav { font-family: tahoma, sans-serif; font-size: 8pt}
```

ASO: Auto Account Creation Profile

Set the ASO: Auto Account Creation profile to "As Required" or "Place Order". This setting affects the Siebel CRM On Demand opportunity conversion for those opportunities that have a customer with more than one account associated with it. The resulting behavior is an Oracle E-Business Suite quote created for the customer without an account defaulted during the opportunity-to-quote conversion process. Users need to manually associate an account with the customer when updating the quote.

ASO: On Demand Integration URL Profile

Set the "ASO: On Demand Integration URL" profile to the On Demand Opportunity Product Line Query process on the BPEL Process Manager Server using this format:

```
http(s)://yourbpelserver.com:7777/orabpel/default/
CRMIntegrationProductLineQueryEBS11i10toSEBLODSync/1.0
```

For example: `http(s)://www.yourcompany.com:7777/orabpel/default/CRMIntegrationProductLineQueryEBS11i10toSEBLODSync/1.0`

The bold text in the previous URLs is environment specific and is the default location for the process on the BPEL Process Manager Server. The location might vary depending on how the process is deployed at your site.

Preventing Navigation Issues on Quote Related Pages

To prevent navigating to an unexpected page when accessing the quote related pages (Quote Listing for Accounts, Opportunity or the Sales Rep), complete the following task.

To configure navigation

- 1 Log in as a system administrator.
- 2 Click Security: Responsibility => Define.
- 3 Query for the responsibility to be assigned to users for accessing the Oracle HTML Quoting module (such as Oracle HTML Quoting Sales Agent), and make a note of the responsibility key (such as HTML_QUOTING_SALES_AGENT).
- 4 Run the following jsp:

```
http(s)://<server: port>/OA_HTML/qotSSbcJfnToken.jsp?qotRespKey=<Responsibility Key>
```

Example:

```
http(s)://yourEBSserver.com: 7777/OA_HTML/  
qotSSbcJfnToken.jsp?qotRespKey=HTML_QUOTING_SALES_AGENT
```

The jfn token parameter is generated.

- 5 Copy the jfn token parameter, and append it to the following two Web link URLs, replacing <jfn> with the jfn token parameter, which was generated in the previous step:

```
http(s)://yourEBSserver.com: 7777/OA_HTML/  
qotSSbpCreate.jsp?qotSblOptyId=%%Id%%&qotOptyNm=%%Name%%&jfn=<jfn>
```

```
http(s)://yourEBSserver.com: 7777/OA_HTML/  
qotSZzdPopup.jsp?qotFrmDspFile=qotSSbcOptyQuotes.jsp&qotOptyId=%%Id%%&qotOptyNm=%%Name%%&jfn=<jfn>
```

NOTE: These URLs are required for the following configuration tasks: “Creating Web Tabs” on page 50 and “Creating Web Links” on page 51.

- 6 Complete the task “Creating Web Tabs” on page 50, and then return to this procedure.

NOTE: The following step cannot be successfully completed until the following task (“Creating Web Tabs” on page 50) is done.

- 7 Test the configuration:
 - a Log in to Siebel CRM On Demand.
 - b Navigate to the Quotes Tab.

- Enter the Oracle E-Business Suite username and password for the Sales Rep.

If successful, Siebel CRM On Demand displays the Quote Listing page, listing all quotes associated with the Sales Rep.

NOTE: This step can only be done after completing the Web Tab setup described on page 58.

Process of Configuring the Siebel CRM On Demand Environment

To configure Siebel CRM On Demand, complete the following tasks:

- [Creating Web Tabs on page 50](#)
- [Creating Web Links on page 51](#)
- [Modifying Layouts on page 53](#)
- [Creating Custom Fields on page 55](#)
- [Modifying Roles on page 55](#)
- [Modifying Pick Lists on page 57](#)
- [Changing Themes on page 58](#)
- [\(Optional\) Setting Up the Client-Side Browser on page 58](#)

Creating Web Tabs

This is a step in [Process of Configuring the Siebel CRM On Demand Environment on page 50](#).

You need to create three custom Web tabs for these pages: the Account Create page, the Create Contact page, and the Quotes page. Follow these guidelines to create those Custom Web Tabs. This is a general guideline only, refer to the Siebel CRM On Demand documentation for the exact steps and details. [Table 10](#) contains the display names and URLs for Web tab creation.

Table 10. Web Tab Specifics

Display Name	URL
Account Create	http(s)://<host>:<port>/OA_HTML/OA.jsp?OAFunc=IMC_SOD_ACCOUNT_CR&OwnerUserId=%%%Useralias%%%

Table 10. Web Tab Specifics

Display Name	URL
Contact Create	http(s)://<host>:<port>/OA_HTML/OA.jsp?OAFunc=IMC_SOD_CONTACT_CR&OwnerUserId=%%%Useralias%%%
Quotes	http(s)://<host>:<port>/OA_HTML/qotSZzdPopup.jsp?qotFrmDspFile=qotSSbcRscQuotes.jsp&qotSblNumOfDays=180&jfn=<jfn token> For information on generating a jfn token, see To configure navigation on page 49 .

To create Web tabs

- 1 Log in as the Siebel CRM On Demand company administrator.
- 2 Navigate to Admin > Application Customization > Custom Web Tabs
- 3 Click New.
- 4 Specify the name to be displayed on the new Web Tab.
- 5 In the URL field enter: <<above>>

Creating Web Links

This is a step in [Process of Configuring the Siebel CRM On Demand Environment on page 50](#).

Perform the following steps using the data from [Table 11](#). The URL must be entered exactly as it is shown in [Table 11](#). The other fields are recommendations only.

These Web link fields are displayed as hyperlinks even in New Account, Contact, and Lead screens. For a successful synchronization of data between Oracle E-Business Suite and Siebel CRM, the user must click the Web link hyperlinks after the account, contact, or lead is saved in Siebel CRM On Demand.

To create Web links

- 1 Log in as the Siebel CRM On Demand company administrator.
- 2 Navigate to Admin > Application Customization > Object > Object Field Setup Page.
- 3 Click New Custom Field.
- 4 Specify the Display Name, set the Field Type to Web Link, and click Save.
- 5 Locate the newly added custom field and click the Edit Web Link.
- 6 Set the values as described in [Table 11](#), and save the data.

Some URLs listed in [Table 11](#) require a jfn token. For information on generating a jfn token, see [Preventing Navigation Issues on Quote Related Pages on page 49](#).

Table 11. Web Link Options

Object	Display Name	Display Text	Launch Behavior	Target Custom Web Tab	URL
Account	View Quotes	View Quotes for an account	Open in Custom Web Tab	Quotes	http(s)://<host>:<port>/OA_HTML/qotSZzdPopup.jsp?qotFrmDspFile=qotSSbcAcctQuotes.jsp&qotHdrPtyId=%%%External_System_Id%%&qotHdrPtyNm=%%%Name%%&jfn=<<jfn token >>
Account	360 View	360 degree view of account	Open in New Window	Not applicable	http(s)://<host>:<port>/OA_HTML/OA.jsp?OAFunc=IMC_SOD_360_VIEW&ImcPartyId=%%%External_System_Id%%&ImcPartyName=%%%Name%%
Account	Create New Account	Create New Account	Open in Custom Web Tab	Account Create	http(s)://<host>:<port>/OA_HTML/OA.jsp?OAFunc=IMC_SOD_ACCOUNT_CR&OwnerUserId=%%%User alias%%
Activity	Account Merge	Account Merge	Open in New Window	Not applicable	http(s)://<CRM OnDemand Server URL>/OnDemand/user/AccountMergeWizard?OMTGT=MergeWizard&OMTHD=MergeWizard&MergeWizard.Step1.SS_Id=%%%Account_Id%%
Activity	Contact Merge	Contact Merge	Open in New Window	Not applicable	http(s)://<CRM OnDemand Server URL>/OnDemand/user/ContactMergeWizard?OMTGT=MergeWizard&OMTHD=MergeWizard&MergeWizard.Step1.SS_Id=%%%Contact_Id%%

Table 11. Web Link Options

Object	Display Name	Display Text	Launch Behavior	Target Custom Web Tab	URL
Lead	Convert Lead	Convert Lead to Opportunity	Open in Custom Web Tab	Account Create	http(s)://<host>:<port>/OA_HTML/OA.jsp?OAFunc=IMC_SOD_CONVERT_LEAD&leadId=%%%Id%%%&OwnerUserId=%%%User alias%%%&leadActName=%%%Company_Name%%%&optyName=%%%First_Name%%%20%%%Last_Name%%%&optyNext=%%%Next_Step%%%&optyDesc=%%%Description%%%&optyRev=%%%Potential_Revenue%%%&optyClose=%%%Estimated_Close_Date%%%&optyId=%%%Opportunity_Id%%%&leadContFname=%%%First_Name%%%&leadContLname=%%%Last_Name%%%&leadContPhone=%%%Work_Phone_#%%%&leadContMobile=%%%Cellular_Phone_#%%%&leadContFax=%%%Fax_Phone_#%%%&leadContEmail=%%%Email_Address%%%
Opportunity	Create Quote	Create Quote in EBS System	Open in Custom Web Tab	Quotes	http(s)://<Oracle EBS Server Host Name>:<port #>/OA_HTML/qotSSbpCreate.jsp?qotSblOptyId=%%%Id%%%&qotOptyNm=%%%Name%%%&jfn=<jfn token>
Opportunity	View Quotes	View Quotes for the Opportunity.	Open in Custom Web Tab	Quotes	http(s)://<host>:<port>/OA_HTML/qotSZdPopup.jsp?qotFrmDspFile=qotSSbcOptyQuotes.jsp&qotOptyId=%%%Id%%%&qotOptyNm=%%%Name%%%&jfn=<jfn token>
Contact	Create New Contact	Create New Contact	Open in Custom Web Tab	Contact Create	http(s)://<host>:<port>/OA_HTML/OA.jsp?OAFunc=IMC_SOD_CONTACT_CR&OwnerUserId=%%%User alias%%%

Modifying Layouts

This is a step in [Process of Configuring the Siebel CRM On Demand Environment on page 50](#).

To modify layouts, perform the following task, using [Table 12](#) as a guide.

To modify layouts

- 1 Log in as the Siebel CRM On Demand company administrator.
- 2 Navigate to Admin > Application Customization > [Object] > [Object] Layout, where [Object] is an object listed in [Table 12](#).
- 3 Click either Select New Layout or Edit an existing Layout.
- 4 For new layouts, set the Name.
- 5 On the Field Setup step, set the appropriate fields to read only, as shown in [Table 12](#).
- 6 On the Field Layout step, add the listed fields to the Layout.
- 7 On The Related Information step, add the items in [Table 12](#) to the Displayed Information section.
- 8 Click Finish.
- 9 Navigate to Admin > User Management & Access Controls > Role Management.
- 10 Click Edit for the roles to assign new layout.
- 11 Navigate to Page Layout Assignment and assign the new layout to the Role.

Table 12. Layout Settings

Object	Layout Name	Role	Read-Only Fields	Layout Fields	Related Information
Account	Account FSR Layout	Field Sales Rep	Location	All Account Web Links created in "Creating Web Tabs" on page 50 .	Addresses
Lead	Lead FSR Layout	Field Sales Rep	N/A	All Lead Web Links created in "Creating Web Tabs" on page 50 .	
Opportunity	Opportunity FSR Layout	Field Sales Rep		All Opportunity Web Links created in "Creating Web Tabs" on page 50 .	
Contact	Contact FSR Layout	Field Sales Rep	Account	All Contact Web Links created in "Creating Web Tabs" on page 50 .	Addresses
Opportunity Product	Oppty Product FSR Layout	Field Sales Rep	Description	N/A	
Task	Task Admin Layout	Admin		All Activity Web Link Fields created in the section above.	

Creating Custom Fields

This is a step in [Process of Configuring the Siebel CRM On Demand Environment on page 50](#).

Complete the following procedure to create custom fields needed by this integration.

To create custom fields

- 1 Log in as the Siebel CRM On Demand company administrator.
- 2 Navigate to Admin > Application Customization > Account > Account Field Setup Page.
- 3 Click New Field.
- 4 Set the Display Name to EBS Status.
- 5 Confirm that the Integration tag is set to stEBS_Status.
- 6 Set the Field Type to Text (Short), and click Save.

Modifying Roles

This is a step in [Process of Configuring the Siebel CRM On Demand Environment on page 50](#).

Complete the following procedure to modify roles as needed by this integration.

To modify roles

- 1 Log in as the On Demand Company System Administrator.
- 2 Navigate to Admin > User Management & Access Controls > Access profiles.
TIP: Copy the Default and Owner Access profiles and edit the copy.
- 3 Click either New or Edit.
- 4 Edit the copied Field Sales Rep Default Access Profile.
 - a Navigate to Step 2 - Specify Access Levels.
 - b Set the following values:
 - ❑ Account Access Level to Read/Edit
 - ❑ Account Related Information, Address Account Default Access to Read/Create/Edit.
 - ❑ Contact Default Access to Read/Edit.
 - ❑ Contact Related Information, Address Contact Default Access to Read/Create/Edit.
 - c Click Finish.
- 5 Edit the copied Field Sales Rep Owner Access Profile.
 - a Navigate to Step 2 - Specify Access Levels.
 - b Set the following values:

- ❑ Account Access Level to Read/Edit.
 - ❑ Account Related Information, Address Account Owner Access to Read/Create/Edit.
 - ❑ Contact Owner Access to Read/Edit.
 - ❑ Contact Related Information, Address Contact Owner Access to Read/Create/Edit.
 - c Click Finish.
- 6 Navigate to Admin > User Management & Access Controls> Role Management.
 - 7 Either select an existing Role or create a new Role by clicking New Role.
 - 8 On Step 2 – Record Type Access page, complete the following:
 - a Make sure the Has Access and Can Read All Records check boxes are checked for Account and Contact Record Type Access.
 - b Make sure the Can Create check box is clear for Account and Contact Record Type Access.
 - 9 On Step 3 – Access Profiles, assign the Access Profile to the role.
 - 10 On Step 4 – Privileges, clear the Convert Leads Privilege check box.
 - 11 On Step 5 - Tab Access & Order, add the Create Contact, Create Account, and Quotes Tabs to the Selected Tabs section.
 - 12 On Step 6 – Page Layout Assignment, select the corresponding Page Layout created for the Objects in [Modifying Layouts on page 53](#).
 - 13 Click Finish.

Enabling Web Services

This is a step in [Process of Configuring the Siebel CRM On Demand Environment on page 50](#).

Enable Web services in Siebel CRM On Demand by doing the following procedure.

To enable Web services

- 1 Log in to Siebel CRM as a company administrator.
- 2 Navigate to Admin > Company Administration > Company Profile > Edit.
- 3 Check the Web Services Enabled check box.

Merging Records

This is a step in [Process of Configuring the Siebel CRM On Demand Environment on page 50](#).

After a successful merge operation in Oracle E-Business Suite, an activity is created for the CRM On Demand company administrator, as specified in the CRMIntegSEBLODConfig.xml file. Because the Oracle E-Business Suite to Siebel CRM On Demand integration user has restricted access to account and contact data, only a company administrator can perform a successful merge operation in CRM On Demand. If Contacts are merged as part of the Account Merge process in Oracle EBS, on the surviving or master account there is no automatic removal of the merged Contacts. If as part of merge, new contacts need to be removed from the surviving account, that needs to be done manually by the system administrator or data librarian.

Personal Information Manager Synchronization

This is a step in [Process of Configuring the Siebel CRM On Demand Environment on page 50](#).

Because the Oracle E-Business Suite to Siebel CRM On Demand integration user has restricted access to account and contact data in Siebel CRM On Demand, this integration user cannot perform a successful Personal Information Manager (PIM) synchronization operation in Siebel CRM On Demand.

Modifying Pick Lists

This is a step in [Process of Configuring the Siebel CRM On Demand Environment on page 50](#).

NOTE: Complete modifying the pick lists before loading customer data from Oracle E-Business Suite to Siebel CRM On Demand.

To modify pick lists

- 1 Run the following query using SQLPLUS on the Oracle E-Business Suite instance, and add new entries to the "Mr./Ms." Picklist (Application Layout / Contact Fields) with Siebel CRM On Demand:
- 2 In Oracle E-Business Suite:

```
select lookup_code, meaning
from fnd_lookup_values_vl
where lookup_type = 'CONTACT_TITLE'
and view_application_id = 222
and enabled_flag = 'Y'
and sysdate between start_date_active and nvl(end_date_active, sysdate + 1)
```
- 3 In Siebel CRM On Demand:

```
Id = lookup_code
Picklist Values = meaning
```
- 4 Also, if a new value is added to CONTACT_TITLE lookup on Oracle E-Business Suite, add the corresponding value to the Siebel CRM On Demand picklist.

Changing Themes

This is a step in [Process of Configuring the Siebel CRM On Demand Environment on page 50](#).

The Siebel CRM On Demand Integration Pack for Oracle E-Business Suite was designed with the “Classic” Siebel CRM On Demand theme in mind. By default the “Contemporary” theme is enabled. You can change the company theme “Classic” (recommended) by navigating to Admin > Company Administration > Company Profile > Company Theme setting.

(Optional) Setting Up the Client-Side Browser

This is a step in [Process of Configuring the Siebel CRM On Demand Environment on page 50](#).

When a user navigates to an Oracle E-Business Suite page embedded within a custom tab, the browser might display the following message:

This page contains both secure and nonsecure items
Do you want to display the nonsecure items?

To prevent this, set your browser's security settings to enable the display of mixed content.

To set browser security settings

- 1 In Internet Explorer navigate to Tools > Internet Options > Security Tab > Local Intranet or Internet (depending on whether your Oracle E-Business Suite instance is deployed on the internet or on a local intranet).
- 2 Click Custom Level.
- 3 In the Miscellaneous section, select Enable for the Display Mixed Content option.

About Using Customized Fields

If you have modified Oracle E-Business Suite using Flex or Extension columns, be aware that these columns cannot be directly transferred to Siebel CRM On Demand. Because Siebel CRM On Demand is implemented in a hosted environment, no customization of these fields is possible.

It is possible to modify the transformation maps. This is at your own risk, so make sure to make a backup copy of the transformation map before attempting any editing. The transformation maps are:

- For Oracle E-Business Suite to Siebel CRM On Demand, the map file is:
CRMIntgXformEBS11i10OrgToSEBLOD11Account.xsl.
- For Siebel CRM On Demand to Oracle E-Business Suite, the map file is:
CRMIntgXformSEBLOD11AccountToEBS11i10Org.xsl.

4

Initial Bulk Loading of Customer, Contact, and Product Data

This chapter describes how to bulk load data from Oracle E-Business Suite into Siebel CRM On Demand. Bulk loading is necessary for the initial load, but can be done at any time if needed. This chapter contains the following sections:

- [“Bulk Loading of Customer and Contact Data” on page 60](#)
- [“Bulk Loading of Product Data” on page 61](#)
- [“Process of Importing CSV Files into Siebel CRM On Demand” on page 62](#)

Bulk Loading of Customer and Contact Data

Bulk loading of customer and contact data is required when preparing to use the Siebel CRM On Demand Integration Pack for Oracle E-Business Suite. Bulk loading can also be used at a later date to move large amounts of customer data, for example, after a purchase of customer data or an acquisition made by the implementing organization. Bulk loading is a one-way process. Data is extracted from Oracle E-Business Suite and imported into Siebel CRM On Demand. [Figure 3](#) illustrates the high-level solution for a customer data bulk load.

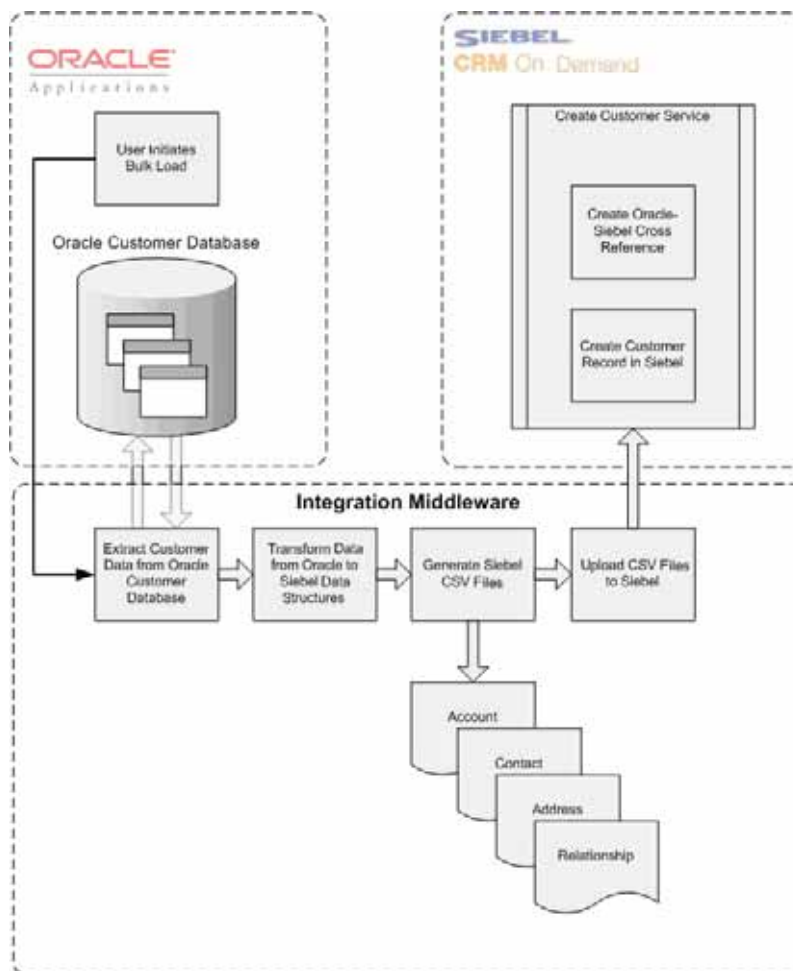


Figure 3. Initial Bulk Load from Oracle E-Business Suite to Siebel CRM On Demand

The Siebel CRM On Demand Data Import infrastructure can import data that is in CSV format. Data extracted using Oracle Warehouse Builder must generate four CSV files, each one containing the following information:

- accounts (organization parties)

- account addresses
- contact addresses
- Organization contacts

Active organization parties that have at least one active account must export the following data:

- Organization contacts
- Active organization party addresses
- Active contact addresses

Organization parties and organization contacts that are associated with an account in Oracle E-Business Suite must be synchronized with Siebel CRM On Demand.

To bulk load customer data by generating CSV files

- 1 Make sure you have completed ["To configure Oracle Warehouse Builder for the Customer Integration" on page 42.](#)
- 2 Navigate to Tools > Control Center Manager.
- 3 Navigate to CRMINTG_XFER_ORGS_TO_OD > CRMINTG_OWB_REPOS_LOC > CRMINTG_OWB_REPOS_MODULE > Mappings.
- 4 Right-click the CRMINTG_1_ACCT_N_ADDR_TO_FILES map, and choose Start.
The Accounts.csv and Account_addr.csv files are generated in the directory that was specified during the execution of the CRMINTG_CUST_XFER_XPRT->DO_DEPLOY_AFTER_IMPORT expert.
- 5 Wait for the process to complete successfully.
- 6 Right-click the CRMINTG_2_ACCT_CR_XREF_IN_EBS map, and choose Start.
This process populates the cross-reference information in the Oracle E-Business Suite database.
- 7 Wait for the process to complete successfully.
- 8 Right-click the CRMINTG_1_CONT_N_ADDR_TO_FILES map, and choose Start.
The Contacts.csv and Contact_addr.csv files are generated in the directory that was specified during the execution of the CRMINTG_CUST_XFER_XPRT->DO_DEPLOY_AFTER_IMPORT expert.
- 9 Wait for the process to complete successfully.

Bulk Loading of Product Data

Bulk loading of product data is similar to that of bulk loading customer data. However, the product data load generates only one CSV file.

To bulk load product data by generating CSV files

- 1 Make sure you have completed ["To configure Oracle Warehouse Builder for the Product Integration" on page 43.](#)

- 2 Navigate to Tools > Control Center Manager.
- 3 Navigate to:
`CRMINTEG_PRODUCT_LOAD_OD > CRMINTEG_PRODUCT_OWB_LOCATION >
CRMINTEG_PRODUCT_OWBREP_MODULE > Mappings > CRMINTEG_PRODUCT_EBS_TO_SEBL`
- 4 Right-click the CRMINTEG_PRODUCT_OWBREP_MODULE map, and choose Start.
The CRMINTEG_PRODUCT_EBS_TO_SEBL_OD.cs file is generated in the directory that was specified during the execution of the CRMINTEG_PRODUCT_EXPERT_MODULE ->CRMINTEG_PRODUCT_EXPERT.
- 5 Wait for the process to complete successfully.

Process of Importing CSV Files into Siebel CRM On Demand

The CSV files generated by Oracle Warehouse Builder must be loaded into Siebel CRM On Demand. [Table 13](#) lists important information about the loading process. Some CSV files are loaded using the Siebel CRM On Demand import wizard, and some are loaded using the OnDemandAddressImport.exe executable.

Make sure the client machine running the Oracle Warehouse Builder client is set to the same language that is used for Siebel CRM On Demand.

Table 13. Information about CSV File Loading Process

Suggested Load Order	CSV File Name	Load Using	Load Prerequisites
1	Accounts.csv	Siebel CRM On Demand Import Wizard	Load at any time. Suggestion: load this file first.
2	Contacts.csv	Siebel CRM On Demand Import Wizard	Load only after the accounts.csv file is successfully loaded.
3	Product.csv	Siebel CRM On Demand Import Wizard	Can be loaded at any time.
4	Account_addr.csv	Use OnDemandAddressImport.exe executable.	Load only after the accounts.csv file is successfully loaded.
5	Contact_addr.csv	Use OnDemandAddressImport.exe executable.	Load only after the contacts.csv file is successfully loaded.

TIP: A spreadsheet application (such as MS Excel, OpenOffice, and so on) that is used to open the CSV file generated from Oracle Warehouse Builder must have support for the character-set enabled on the Oracle Warehouse Builder repository. This requirement is primarily applicable to Multiple Language Sets installs. [Table 1 on page 15](#) lists the supported character sets.

To complete this process, perform the following tasks:

- 1 [Launching the Siebel CRM On Demand import Wizard on page 63](#)
- 2 [Using the Import Wizard on page 64](#)
- 3 [Configuring the CRMIntegSEBLODAddressLoader.exe.config File on page 64](#)
- 4 [Using the Address Import Executable on page 65](#)

Launching the Siebel CRM On Demand import Wizard

This is a step in [Process of Importing CSV Files into Siebel CRM On Demand on page 62](#).

To launch the Siebel CRM On Demand import wizard

- 1 Log in with an account that has the privilege, Administration Import.
- 2 Navigate to the Admin Homepage.
- 3 Click Import and Export Tools.
- 4 Select the object type to Import.
This launches the Import Wizard.

Using the Import Wizard

This is a step in [Process of Importing CSV Files into Siebel CRM On Demand on page 62](#).

To use the import wizard

- 1 Accept the default options, and select a CSV file using the browse button.
- 2 Select the provided map file that maps the data in the CSV file to the default Siebel CRM On Demand Columns:
 - OnDemand_Account_Field_Mapping.map
 - OnDemand_Contact_Field_Mapping.map
 - OnDemand_Product_Field_Mapping.map
- 3 You can change the default mapping if desired.
The wizard alerts you about any fields in your data file that were not mapped.

Configuring the CRMIntegSEBLODAddressLoader.exe.config File

This is a step in [Process of Importing CSV Files into Siebel CRM On Demand on page 62](#).

The CRMIntegSEBLODAddressLoader.exe.config file must be modified to map to the Siebel CRM On Demand server hosting your Siebel CRM On Demand CRM Application and the internet protocol used.

To configure the CRMIntegSEBLODAddressLoader.exe.config file

- 1 Open the CRMIntegSEBLODAddressLoader.exe.config file with a text editor.
- 2 Add a key for your Siebel CRM On Demand Server using the following format:

```
<add key="OnDemandServer" value="[server name]" />
```

Example:

```
<add key="OnDemandServer" value="secure-ausomxafa.crmondemand.com" />
```

- 3 If you use an internet protocol other than https://, add a key for the internet protocol you use, in the following format:

```
<add key="InternetProtocol " value="[protocol name]" />
```

Example:

```
<add key="InternetProtocol " value="Secure or Non Secure HTTP protocol " />
```

Using the Address Import Executable

This is a step in [Process of Importing CSV Files into Siebel CRM On Demand on page 62](#).

To use the address import executable

- 1 Make sure you have .NET Framework 1.1 or newer.
- 2 Launch the CRMIntegSEBLODAddressLoader.exe executable.
- 3 Indicate if this is an account address or contact address import.
- 4 Browse for the file containing the address data.
- 5 Click Import.

5

About Integrating Customer Data, Products, and Quotes

This chapter describes the integration points for contained in Siebel CRM On Demand Integration Pack for Oracle E-Business Suite. It contains the following sections:

- [Integration Assumptions on page 67](#)
- [Customer Data Integration on page 68](#)
- [Product Integration on page 84](#)
- [Quote Integration on page 86](#)

Integration Assumptions

The following conditions are assumed to be present for this integration:

- [Oracle E-Business Suite User Management Assumptions on page 67](#)
- [Customer Data Synchronization Assumptions on page 67](#)
- [Product Data Synchronization Assumptions on page 68](#)

Oracle E-Business Suite User Management Assumptions

When a user logs in to Oracle E-Business Suite seamless navigation between the two applications is enabled. The user is prompted to log in to Oracle E-Business Suite when first attempting to access an Oracle E-Business Suite page. Subsequent visits to an Oracle E-Business Suite page do not require the user to log in. An automatic log-in between Siebel CRM On Demand and Oracle E-Business Suite by way of Single Sign-on is not provided in this integration.

The application user must have a user account on both Siebel CRM On Demand and Oracle E-Business Suite. The user profiles on each of the respective applications operate independently, with the expectation that language preferences and other user preferences and localizations are set up to be synchronized between the accounts. It is the user's responsibility to manually maintain this synchronization. This synchronization is not provided in this integration.

Customer Data Synchronization Assumptions

The Siebel CRM On Demand Customer Master and the Oracle E-Business Suite Customer master are expected to be synchronized to enable the integration of Siebel CRM On Demand opportunity with quoting. Updates to Account and Contact records made by the Admin user specified in the CRMIntegSEBLODConfig.xml file are not pushed to the Oracle E-Business Suite. This is to avoid endless feedback looping updates to the Account and Contact records in the respective databases.

The integration assumes that Siebel CRM On Demand users have access to the Oracle E-Business Suite application either directly through the company intranet, VPN, or similar.

Product Data Synchronization Assumptions

The Siebel CRM On Demand Product Catalog and Oracle E-Business Suite Item Master are expected to be synchronized to enable the Siebel CRM On Demand opportunity product lines to be passed to Oracle E-Business Suite quoting. Product data are initially loaded into Siebel CRM On Demand using a bulk load. Subsequent changes or product additions in Oracle E-Business Suite are synchronized with Siebel CRM On Demand. All product information is maintained within Oracle E-Business Suite and synchronized with Siebel CRM On Demand.

Customer Data Integration

After the initial load of the Customer Data from Oracle E-Business Suite into Siebel CRM On Demand is complete, the customer records that exist in both applications are synchronized, so that data integrity is maintained. Customer data is synchronized whenever an existing customer record that exists in both applications is changed in either application or when a new customer record is created in Oracle E-Business Suite.

Synchronization Flows

The Customer Data integration consists of the following synchronizations:

- [About Creating New Customers in Oracle E-Business Suite on page 68](#)
- [About Creating New Customers in Siebel CRM On Demand on page 69](#)
- [About Updating Existing Customers in Oracle E-Business Suite on page 74](#)
- [About Updating Existing Customers in Siebel CRM On Demand on page 75](#)
- [About Converting Leads on page 76](#)
- [About Integrating 360° View User Interface on page 77](#)

You cannot create new customers directly in Siebel CRM On Demand, only update existing ones. Oracle E-Business Suite is the master for accounts and contacts, and as such new accounts and contacts must be created in Oracle E-Business Suite.

About Creating New Customers in Oracle E-Business Suite

When a new Customer Account record is created in Oracle E-Business Suite through any Oracle E-Business Suite product UI or Oracle E-Business Suite Public API, a new account is created in Siebel CRM On Demand. Any updates made to this customer account later in Oracle E-Business Suite or Siebel CRM On Demand are synchronized. New customer accounts created through bulk import processes in Oracle E-Business Suite are not synchronized with Siebel CRM On Demand.

Figure 4 illustrates the data synchronization flow used when a new customer record is created in Oracle E-Business Suite.

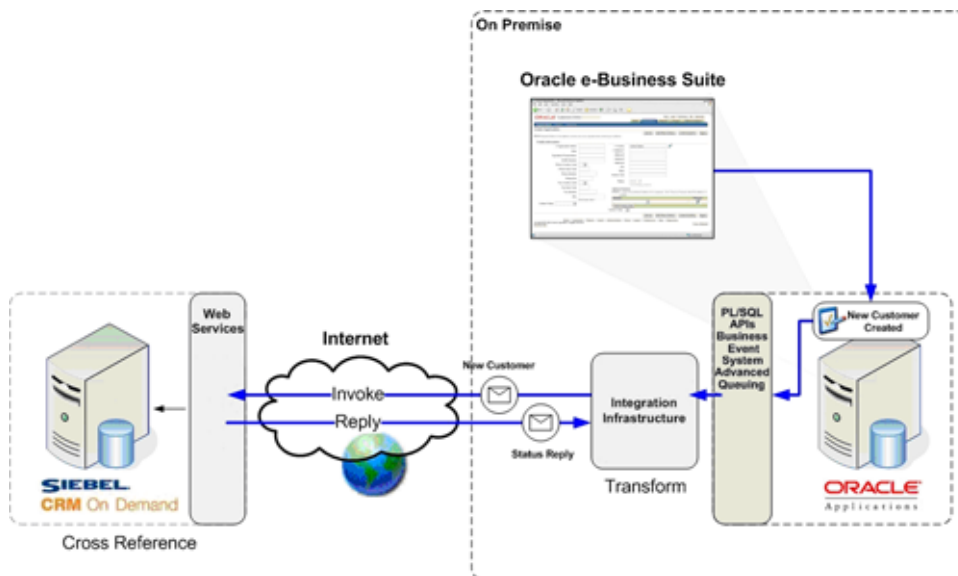


Figure 4. Create New Customer Accounts in Oracle E-Business Suite - Synchronization Flow

About Creating New Customers in Siebel CRM On Demand

New customer data in Siebel CRM On Demand is created through a Create Account or Create Contact Oracle E-Business Suite application page deployed within the Oracle E-Business Suite middle tier (on premise) and made available in Siebel CRM On Demand using a Web link custom tab. You must disable the existing links to the standard Create Account or Create Contact functionality in the Siebel CRM On Demand User Interface.

New customer data in Siebel CRM On Demand is created using an Oracle E-Business Suite Create Account page or Create Contact page embedded within a Siebel CRM On Demand custom tab. The existing Create Account or Create contact functionality within the Siebel CRM On Demand user interface is disabled as part of the configuration steps. For more information on disabling these privileges, see [Modifying Roles on page 55](#).

When an Siebel CRM On Demand user creates a new account or contact, the user is redirected to the Create Account or Create Contact application User Interface (UI) page. [Figure 5](#) shows an example of the Create New Account page. This application UI page has the look and feel of the standard Siebel CRM On Demand User Interface.

SIEBEL CRM OnDemand

Customer Care Training MySetup Deleted Items Help Sign Out

Home Leads Accounts **Account Create** Contacts Contact Create Opportunities Quotes

New Account [Cancel] [Save]

Account Information

* Account Name [Text Box] Web Site [Text Box]
 Furigana Name [Text Box] Main Phone # [Text Box]
 Account Currency [Dropdown] Main Fax # [Text Box]

Additional Information

☐ Public Company Number of Employees [Text Box]
 Annual Revenues [Text Box]

Address Information

TIP Required fields in the address section are only required when entering an address.

Billing	Shipping
Country [Dropdown]	Country [Dropdown]
* Number/Street [Text Box]	* Number/Street [Text Box]
Address 2 [Text Box]	Address 2 [Text Box]
City [Text Box]	City [Text Box]
State [Text Box]	State [Text Box]
Zip [Text Box]	Zip [Text Box]

Description [Text Box]

[Cancel] [Save]

Figure 5. The Create New Account Page

Figure 6 shows an example of the Create New Contact page. This page differs from the standard Siebel CRM On Demand Create New Contact page in that the Account section has been removed. This section is not required, because in Siebel CRM On Demand, it is a read-only section and displays the primary billing address of the Account by default.

SIEBEL CRM OnDemand

Customer Care Training MySetup Deleted Items Help Sign Out

Home Leads Accounts Account Create Contacts **Contact Create** Opportunities Quotes

New Contact

Cancel Save

Contact Information

Mr./Ms. Department

* First Name Work Phone #

Middle Name Work Fax #

* Last Name Cellular Phone

* Account E-Mail

Job Title

Address Information

TIP Required fields in the address section are only required when entering an address.

Country

* Number/Street

Address 2

City

State

Zip

Cancel Save

Figure 6. The Create New Contact Page

When the new record is saved it invokes a process flow that creates the new record in both Oracle E-Business Suite and Siebel CRM On Demand as illustrated in [Figure 7](#).

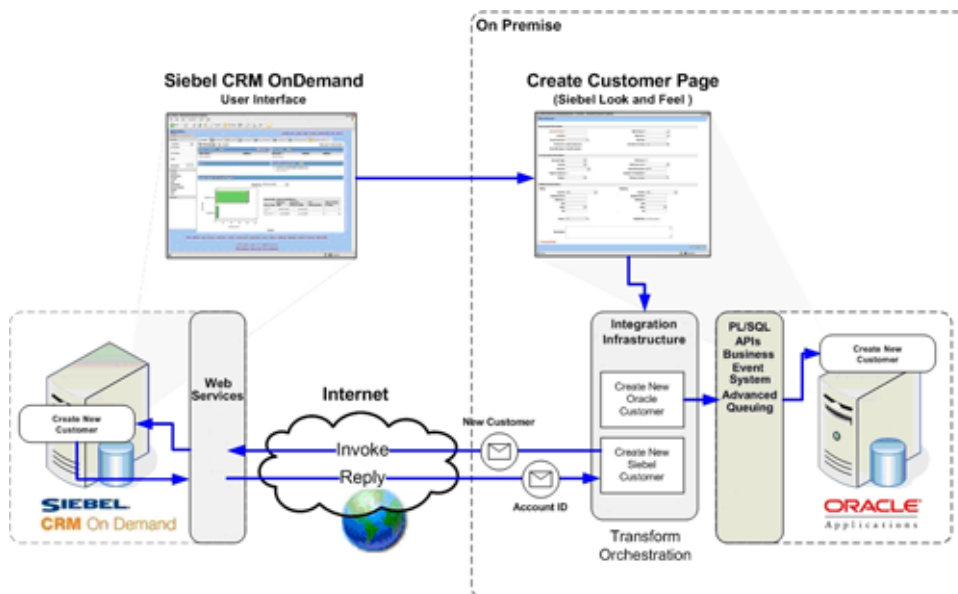


Figure 7. Create New Customers in Siebel CRM On Demand—Synchronization Flow

Figure 8 provides more details on this synchronization flow.

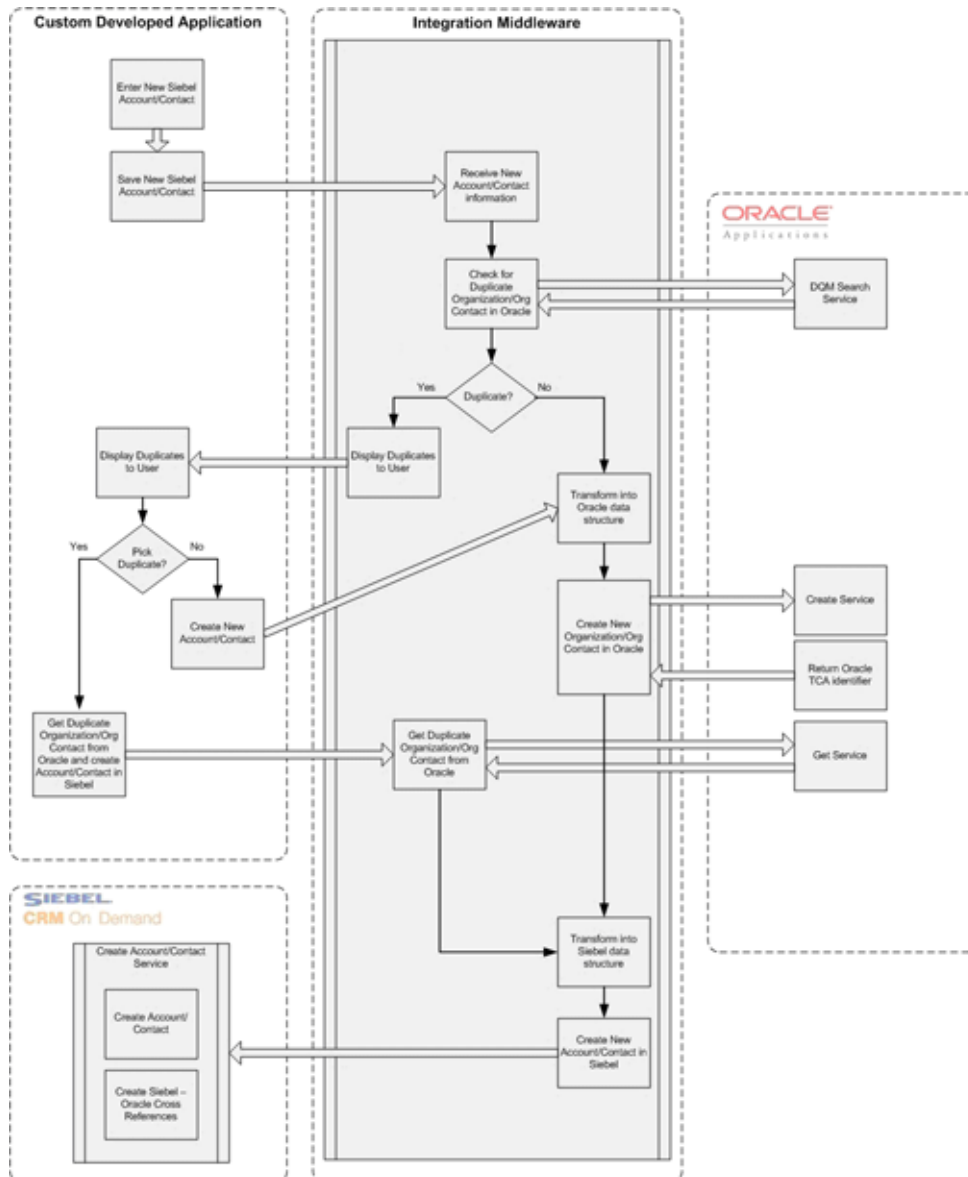


Figure 8. Create New Customer in Siebel CRM On Demand - Detailed Synchronization Flow

About Updating Existing Customers in Oracle E-Business Suite

Figure 9 illustrates the data synchronization flow when an existing customer record is updated in Oracle E-Business Suite. This flow is very similar to creating a new customer record. When a relevant, existing customer record is updated in Oracle E-Business Suite, the updated customer record is synchronized with Siebel CRM On Demand.

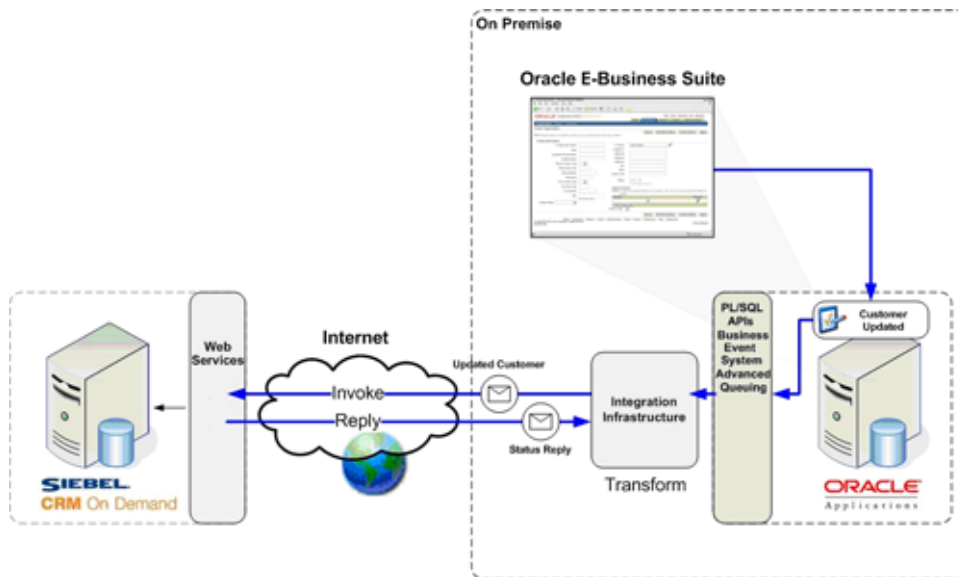


Figure 9. Update an Existing Customer in Oracle E-Business Suite - Synchronization Flow

Only newly created or updated Oracle organization parties and organization contacts that are associated with an account in Oracle E-Business Suite need to be synchronized with Siebel CRM On Demand. Persons Parties (no matter if they are associated with an account in Oracle or not) that do not have a relationship with an organization do not need to be synchronized.

About Updating Existing Customers in Siebel CRM On Demand

Siebel CRM On Demand can detect changed customer records, but it does not have the capability of publishing these changes in real-time. Siebel CRM On Demand is not capable of initiating the synchronization flow. A BPEL process polls the Siebel CRM On Demand audit tables to discover these updates. This process calls another BPEL process to synchronize the updates for account and contacts. [Figure 10](#) illustrates this flow.

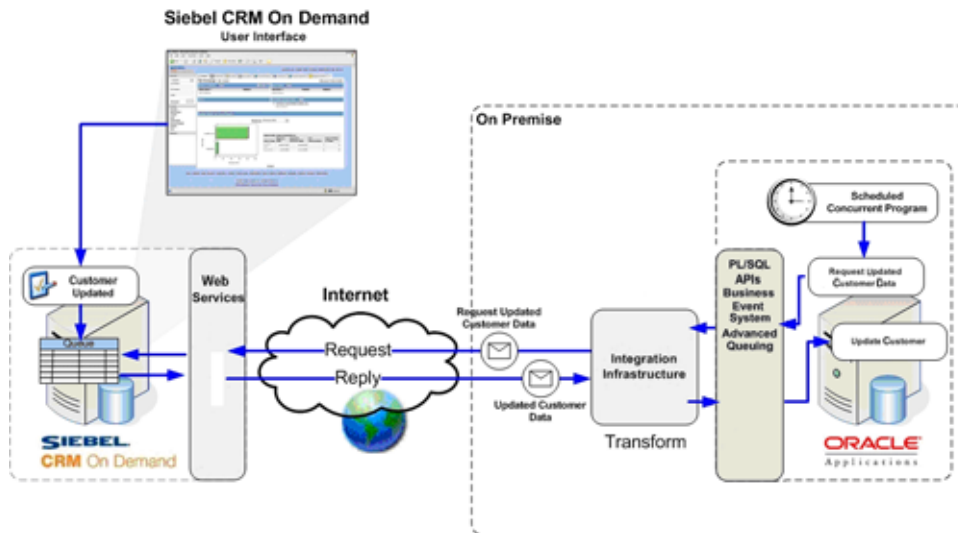


Figure 10. Update an Existing Customer in Siebel CRM On Demand - Synchronization Flow

Only updated Siebel CRM On Demand accounts and account contacts need to be synchronized with Oracle E-Business Suite. Updates to stand-alone contacts (without a relationship with an account) are not synchronized. Only updates to Siebel CRM On Demand accounts and account contacts that exist in Oracle E-Business Suite need to be synchronized.

About Converting Leads

For the Siebel CRM On Demand Integration Pack for Oracle E-Business Suite to work, an opportunity in Siebel CRM On Demand must be associated with an existing account. This is not a requirement in standard Siebel CRM On Demand. As part of the Siebel CRM On Demand Integration Pack for Oracle E-Business Suite, a Convert Lead to Opportunity page is deployed within the Oracle E-Business Suite middle tier (on premise) and made available in Siebel CRM On Demand using a Web link. When an Siebel CRM On Demand user clicks the Convert Lead link in Siebel CRM On Demand, the user is directed to a specialized page that converts the lead into an opportunity. To make the transition seamless this page has the look and feel of the standard Siebel CRM On Demand User Interface.

Figure 11 shows an example of this page.

Figure 11. The Convert Lead Page

The relevant fields from the Lead Detail page are displayed by default on the Convert Lead page. You can associate an account with this lead either by choosing an existing account from the Account LOV, or by entering a new account name. You can optionally create an opportunity from this lead.

Figure 12 illustrates the process and data flow that are executed when the process, Create Lead to Opportunity, is started from the custom Convert Lead page.

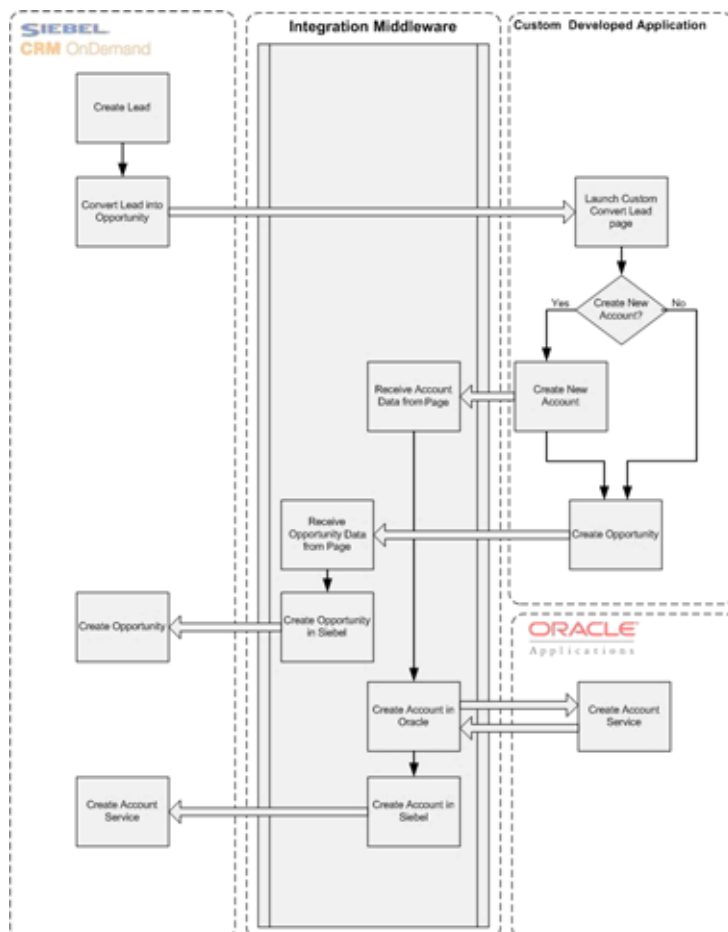


Figure 12. Process Flow for Converting an Siebel CRM On Demand Opportunity to an Oracle E-Business Suite Quote

About Integrating 360° View User Interface

A user interface (UI) page is in the Oracle Customer Online application of Oracle E-Business Suite. This UI page displays all transactions for a customer, such as invoices, orders, quotes, service requests, and so on. It is known as the 360° View, because it provides a full view of all of the customer's transactions. This 360° Transaction View page of the Oracle Customer Online application is exposed in the Siebel CRM On Demand user interface as a global link, or in a global link custom tab, so that an Siebel CRM On Demand user can also get a full view of all of the customer's transactions. It opens in a separate browser window.

Figure 13 illustrates the 360° View.

Business World : Transactions

You may select a particular transaction type to view a specific transaction history or click on List View button to see a complete list of business transactions.

Select

* Transaction Type Campaigns Go

Campaign Name	Schedule Name	Source Code	Start Date	End Date	Activity	Objective	Target Group
No data exists.							

More

Events

Name	One Off	Event Type	Source Code	Start Date	End Date	Vendor	Invited	Registered	Attended	Contact
Vision Computers Expo 2002	No	Trade Show	AMER02020003	01-JAN-2002	30-JUN-2004	DUPHY	Yes	No	No	Ray Adams
Vision Computers Expo 2002	No	Trade Show	AMER02020003	01-JAN-2002	30-JUN-2004	DUPHY	Yes	No	No	Jandre Beaulieu
Vision Computers Expo 2002	No	Trade Show	AMER02020003	01-JAN-2002	30-JUN-2004	DUPHY	Yes	No	No	Michelle Baker
Vision Computers Expo 2002	No	Trade Show	AMER02020003	01-JAN-2002	30-JUN-2004	DUPHY	Yes	No	No	Lisa Branch
Vision Computers Expo 2002	No	Trade Show	AMER02020003	01-JAN-2002	30-JUN-2004	DUPHY	Yes	No	No	Jim Yen

More

Quotes

Account Number	Account Description	Quote Name	Quote Number	Contact Name	Status	Primary Salesperson	Creation Date	Amount
1608	Business World	BW Oppy-2-Quote	6524		Draft	Jones, Mrs. Lisa	21-NOV-2006	16,707.65 USD
4429	Business World	BW Oppy-2-Quote	6524		Draft	Jones, Mrs. Lisa	21-NOV-2006	16,707.65 USD
1608	Business World	BW Oppy-2-Quote	6523		Draft	Jones, Mrs. Lisa	21-NOV-2006	16,707.65 USD
4429	Business World	BW Oppy-2-Quote	6523		Draft	Jones, Mrs. Lisa	21-NOV-2006	16,707.65 USD
1608	Business World	BW Oppy-2-Quote	6522		Draft	Jones, Mrs. Lisa	21-NOV-2006	16,707.65 USD

More

Orders

Account Number	Customer Name	Sales Order	Customer PO	Order Type	Category	Date Ordered	Requested Ship Date	Status
1608	Business World	51854		Order Only	Order	02-APR-2002	02-APR-2002	Closed
1608	Business World	51860		Order Only	Order	02-APR-2002	02-APR-2002	Closed
1608	Business World	10638		Web	Mixed	02-APR-2002	02-APR-2002	Closed
1608	Business World	10666		Web	Mixed	04-APR-2002	04-APR-2002	Closed
1608	Business World	51872		Order Only	Order	03-APR-2002	03-APR-2002	Closed

More

Figure 13. The 360° View

Customer Data Mappings

The following topics describe how customer data is mapped between Oracle E-Business Suite and Siebel CRM On Demand:

- "Account Entity Attribute Mappings" on page 79
- Address Entity Attribute Mappings on page 80
- Contact Entity Attribute Mappings on page 82

Account Entity Attribute Mappings

Table 14 lists the data mappings for account data.

Table 14. Data Mappings for Account Data

ID	Siebel CRM On Demand Attribute Name	Data Type	Max Length	Oracle E-Business Suite Attribute Name
1	Account Name. Indicates the name of the account	Text	100	Entity: Organization Attribute: organization_name Note: substr (100)
2	Account Currency	Picklist Pre-defined	15	Entity: Organization Attribute: pref_functional_currency
3	Location. Indicates the type of facility operated by the account at this site, such as Headquarters	Text	50	Entity: Organization Attribute: party_number Note: Siebel CRM On Demand does not synchronize this field back to CDH.
4	Web Site URL address for the account	Text	100	Entity: Contact Point Attribute: URL Note: Primary for contact_point_type = WEB. substr (100)
5	Public Company Indication that the account is a publicly owned company	Check box		Entity: Organization Attribute: public_private_ownership_flag
6	Annual Revenues Amount of the company's annual revenue	Number	15	Entity: Organization Attribute: curr_fy_potential_revenue
7	Description Additional information about the account	Text	1999	Entity: Organization Attribute: mission_statement
8	External Unique ID	Text	30	Entity: Organization Attribute: party_id Note: Trading Community Architecture's party_id for the organization
9	Furigana Name The Furigana equivalent of the Kanji (for Japanese only)	Text	100	Entity: Organization Attribute: organization_name_phonetic

Table 14. Data Mappings for Account Data

ID	Siebel CRM On Demand Attribute Name	Data Type	Max Length	Oracle E-Business Suite Attribute Name
10	Main Fax #	Text	40	Entity: Contact Point Attribute: raw_phone_number Note: Maps to the primary (or last created if no primary) contact point where CONTACT_POINT_TYPE='PHONE' and PHONE_LINE_TYPE='FAX'.
11	Main Phone #	Text	40	Entity: Contact Point Attribute: raw_phone_number Note: Maps to the primary (or last created if no primary) contact point where CONTACT_POINT_TYPE='PHONE' and PHONE_LINE_TYPE!='FAX'.
12	Number of Employees	Number		Entity: Organization Attribute: employees_total

Address Entity Attribute Mappings

Table 15 lists the data mappings for address data.

Table 15. Address Entity Attribute Mapping

ID	Siebel CRM On Demand Attribute Name	Data Type	Max Length	Oracle E-Business Suite Attribute Name
1	External Unique ID	Text	30	Entity: Party Site Attribute: party_site_id Note: Trading Community Architecture's party_site_id for the address will be stored in this column.
2	Address 1	Text	200	Entity: location Attribute: address1 Note: substr (200)
3	Address 2	Text	100	Entity: location Attribute: address2 Note: substr (100)
4	Address 3	Text	100	Entity: location Attribute: address3 Note: substr (100)

Table 15. Address Entity Attribute Mapping

ID	Siebel CRM On Demand Attribute Name	Data Type	Max Length	Oracle E-Business Suite Attribute Name
5	City	Text	50	Entity: location Attribute: city Note: substr (50)
6	Country	Picklist	30	Entity: location Attribute: country
8	Province	Text	50	Entity: location Attribute: province Note: substr (50).
9	US State	Picklist	2	Entity: location Attribute: state Note: If the country value is US, then populate the two-letter state code. For other countries, do not populate this column, instead populate the province.
10	Billing Zip / Postal Code	Text	30	Entity: location Attribute: postal_code Note: substr (30)
11	Billing	Checkbox	N/A	Entity: Party Site Use Attribute: primary_per_type () Note: If the site has a primary bill to use, set this to Y, otherwise N. Only for Account Address.
12	Shipping	Checkbox	N/A	Entity: Party Site Use Attribute: primary_per_type () Note: If the site has a primary ship to use, mark this Y, otherwise N. Only for Account Address.
13	Primary	Checkbox	N/A	Entity: Party Site Attribute: identifying_flag Note: If the site has identifying_flag = Y, mark Y, otherwise N. Only for contact address.

Table 15. Address Entity Attribute Mapping

ID	Siebel CRM On Demand Attribute Name	Data Type	Max Length	Oracle E-Business Suite Attribute Name
14	Contact External ID	Text	30	Entity: Party Attribute: party_id Note: Trading Community Architecture's party_id for the relationship party is stored in this column.
15	Account External ID	Text	30	Entity: Party Site Attribute: party_id Note: Trading Community Architecture's party_id for the organization is stored in this column.

Contact Entity Attribute Mappings

Table 16 lists the data mappings for contact data.

Table 16. Contact Entity Attribute Mapping

ID	Siebel CRM On Demand Attribute Name	Data Type	Max Length	Oracle E-Business Suite Attribute Name
1	External Unique ID	Text	30	Entity: Organization Contact Attribute: relationship_id Note: Trading Community Architecture's party_relationship_id is stored in this column.
2	First Name	Text	50	Entity: Person Attribute: person_first_name Note: substr (50)
3	Last Name	Text	50	Entity: Person Attribute: person_last_name Note: substr (50)
4	Middle Name	Text	50	Entity: Person Attribute: person_middle_name Note: substr (50)
5	Mr./Mrs.	Picklist	15	Entity: Person Attribute: person_pre_name_adjunct
6	Furigana First Name	Text	50	Entity: Person Attribute: person_first_name_phonetic Note: substr (50)

Table 16. Contact Entity Attribute Mapping

ID	Siebel CRM On Demand Attribute Name	Data Type	Max Length	Oracle E-Business Suite Attribute Name
7	Furigana Last Name	Text	50	Entity: Person Attribute: person_last_name_phonetic Note: substr (50)
9	Work Phone #	Text	40	Entity: Contact Point Attribute: raw_phone_number Note: Maps to the primary (or last created if no primary) contact point where CONTACT_POINT_TYPE='PHONE' and PHONE_LINE_TYPE='GEN'.
10	Work Fax #	Text	40	Entity: Contact Point Attribute: raw_phone_number Note: Maps to the primary (or last created if no primary) contact point where CONTACT_POINT_TYPE='PHONE' and PHONE_LINE_TYPE='FAX'.
11	Cellular Phone #	Text	40	Entity: Contact Point Attribute: raw_phone_number Note: Maps to the primary (or last created if no primary) contact point where CONTACT_POINT_TYPE='PHONE' and PHONE_LINE_TYPE='MOBILE'.
12	Email	Text	100	Entity: Contact Point Attribute: email_address Note: Primary one for contact_point_type = EMAIL
13	Department Name of the department of the contact	Text	75	Entity: Contact Attribute: department Note: See "Contact Notes" on page 84.
14	Job Title	Text	75	Entity: Contact Attribute: job_title Note: See "Contact Notes" on page 84.

Contact Notes

In Siebel CRM On Demand, organization contacts can represent multiple organizations, but these attributes are always the same for a person. However, Trading Community Architecture can maintain different attributes for each specific organization that a person is related to. Although this configuration is more flexible, the reality is that most of the time, one person represents only one organization. When Oracle E-Business Suite sends contact information to Siebel CRM On Demand, it sends only the information from the oldest organization contact record.

Product Integration

Product information is defined and maintained in Oracle E-Business Suite (in Oracle Item Master) and after the initial loading is synchronized with Siebel CRM On Demand in real time. The following topics cover product integration:

- [Product Integration Notes on page 84](#)
- [User Procedures on page 85](#)
- [Product Mappings on page 85](#)

Product Integration Notes

The following rules describe the limits and abilities of this integration:

- Only simple products (flat structure, nonhierarchal product structures) are synchronized.
- There is no synchronization of Operating Unit information, because Siebel CRM On Demand does not support it. Distinct (orderable) products, regardless of Operating Unit are synchronized.
- Catalog categories and category assignments are not synchronized.
- Only products eligible for the sales representative to quote are transferred to the Oracle E-Business Suite quote upon opportunity-to-quote conversion.
- The flags, customer ordered and customer orders enabled, must be controlled at the Master Organization level and not at the Organization level. Only items flagged as follows, customer ordered and customer orders enabled, are included as part of the initial load process into Siebel CRM On Demand.
- In the incremental load even if the flag, customer orders enabled, is not checked then the items still synchronize with Siebel CRM On Demand.
- Products in the Siebel CRM On Demand opportunity must exist on the Oracle E-Business Suite default price list during quote creation to be included in a quote. If one of the opportunity product lines does not exist in the default price list, it is not included in the quote.
- Products on the Siebel CRM On Demand opportunity must be associated with the logged-in user's item validation organization or operating unit (Org_ID) to be included in the quote during conversion. Items that do not belong to the user's associated Item Validation Org are not added to the quote.

- The quantity associated with the Product Line on an Siebel CRM On Demand opportunity is passed to the corresponding line on the Oracle E-Business Suite quote upon conversion. The Unit of Measure (UOM) for the product line is derived from the item's Primary UOM on the Oracle E-Business Suite product master.
- If a product is obsolete, indicate this information in Oracle E-Business Suite by setting the Customer Ordered Enabled flag to No. Do not set the Customer Order flag to No.

User Procedures

The following procedures are for end users.

TIP: The Item Description field in Oracle E-Business Suite equates to Product Name in Siebel CRM On Demand and Long Description in Oracle E-Business Suite equates to Description in Siebel CRM On Demand. You might want to clean up the Oracle item descriptions and long descriptions before synchronizing.

To create items or products to be synchronized

- 1 In Oracle Item Master, create a new item.
- 2 Populate the attributes for the item.
- 3 Update the item status to Orderable.

The item status change updates the 'Customers Ordered' and 'Customer Orders Enabled' flags and Oracle Item Master synchronizes the item with Siebel CRM On Demand Product Master.

To modify items or products

- 1 Query for the item or product in Oracle Item Master.
- 2 Update the item attributes.
- 3 Save the changes to the item.

Oracle Item Master synchronizes the item with Siebel CRM On Demand Product Master.

Product Mappings

Table 17 lists the mappings for products.

Table 17. Product Mappings

Attribute Names in Siebel CRM On Demand	Attribute Names in Oracle E-Business Suite
Description	ITEM_LONG_DESCRIPTION
ExternalSystemId	INVENTORY_ITEM_ID ':' ORGANIZATION_ID

Table 17. Product Mappings

Attribute Names in Siebel CRM On Demand	Attribute Names in Oracle E-Business Suite
OrderableFlag	CUSTOMER_ORDER_ENABLED_FLAG
PartNumber	CONCATENATED_SEGMENTS
ProductName	ITEM_SHORT_DESCRIPTION(CONCATENATED_SEGMENTS ' - ' ORGANIZATION_CODE)

Quote Integration

The following topics cover the details of the quote integration:

- [Integration Features on page 86](#)
- [Integration Overview on page 87](#)

Integration Features

The Siebel CRM On Demand Integration Pack for Oracle E-Business Suite provides the following features:

- [Creating an Oracle E-Business Suite Quote from a Siebel CRM On Demand Opportunity on page 86](#)
- [Displaying Oracle E-Business Suite Quotes Associated with a Siebel CRM On Demand Opportunity on page 87](#)
- [Displaying Oracle E-Business Suite Quotes Associated with a Siebel CRM On Demand Customer Account on page 87](#)

Creating an Oracle E-Business Suite Quote from a Siebel CRM On Demand Opportunity

From within the Siebel CRM On Demand Opportunity Detail page, you can initiate the Create Quote process by clicking a custom Web link, which creates an Oracle E-Business Suite quote as a background process. The newly created quote takes the Siebel CRM On Demand opportunity context (account - organization id, opportunity name, and so on), including the opportunity product lines during quote creation. Siebel CRM On Demand displays a summary page, listing the quotes associated with the opportunity. You can drill down on an individual quote, which launches a separate browser session in which you can update the Oracle E-Business Suite quote.

Displaying Oracle E-Business Suite Quotes Associated with a Siebel CRM On Demand Opportunity

From within the Siebel CRM On Demand Opportunity Detail page, you can review a listing of quotes associated with the opportunity by clicking a custom Web link. This opens an Oracle E-Business Suite page containing a summary table of quotes associated with the opportunity. You can drill down on an individual quote, which launches a separate browser session in which you can update the Oracle E-Business Suite quote.

Displaying Oracle E-Business Suite Quotes Associated with a Siebel CRM On Demand Customer Account

From within the Siebel CRM On Demand Account Detail page, you can review a listing of quotes associated with the customer account by clicking a custom Web link, which opens an Oracle E-Business Suite page containing a summary table of quotes associated with the Siebel CRM On Demand customer account within an Siebel CRM On Demand custom Web tab. You can drill down on an individual quote, which launches a separate browser session in which you can update the Oracle E-Business Suite quote.

Integration Overview

The Siebel CRM On Demand Integration Pack for Oracle E-Business Suite is enabled using Siebel CRM On Demand Custom Web Tabs, Custom Web Links, and Web Services infrastructure with the Oracle E-Business Suite BPEL Process Manager. The resulting integration functionality enables the following:

- Ability to create an Oracle E-Business Suite quote from an Siebel CRM On Demand opportunity
- Ability to display Oracle E-Business Suite quotes associated with an Siebel CRM On Demand opportunity
- Ability to display all Oracle E-Business Suite quotes associated with an Siebel CRM On Demand Customer account
- Ability to display all quotes on which the user is the Primary Sales Rep

Figure 14 illustrates this functionality.

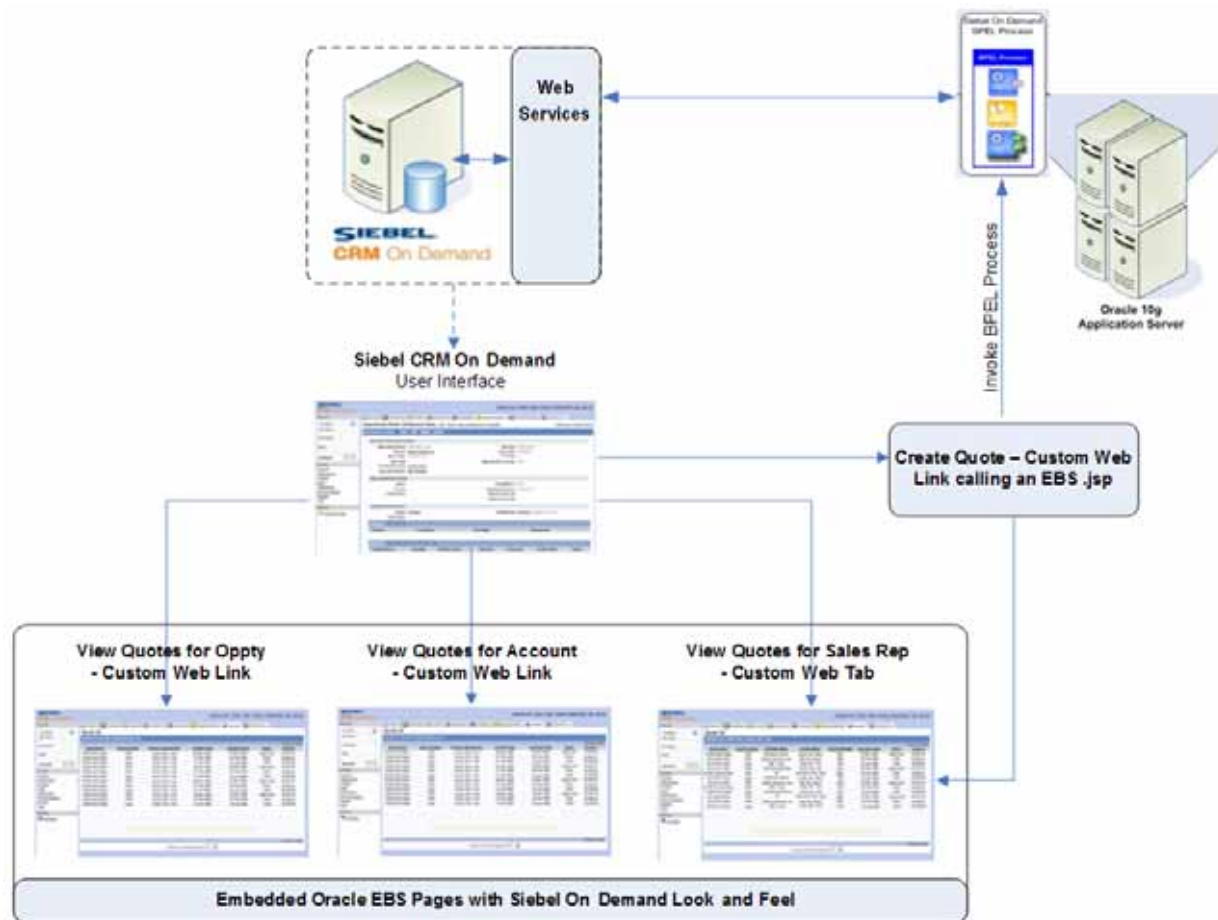


Figure 14. Integration functionality

Creating Oracle E-Business Suite Quotes from Siebel CRM On Demand Opportunities

From within the Siebel CRM On Demand Opportunity Detail page, a user can initiate the creation of a quote by clicking a custom Web link, which creates an Oracle E-Business Suite quote as a background process. Users are directed to a summary page, listing the quotes associated with the opportunity within an Siebel CRM On Demand custom Web tab. Users are able to drill down on an individual quote, which launches a separate browser session in which the user can update the Oracle E-Business Suite quote.

Basic information from the opportunity (customer account, customer contact, product information) is carried forward to the newly created quote. Information such as sales credit, sales-team integration, and so on are not synchronized.

About Siebel CRM On Demand Opportunity Context to Be Carried Forward to Oracle E-Business Suite Quote

The following Siebel CRM On Demand opportunity contexts are passed to the Oracle E-Business Suite quote header to ensure the quote is created appropriately:

- Siebel CRM On Demand account > Oracle E-Business Suite Customer Name
- Siebel CRM On Demand Primary Opportunity Contact > Oracle E-Business Suite Contact Name
- Siebel CRM On Demand Opportunity Name > Oracle E-Business Suite Quote Name
- Siebel CRM On Demand Product Lines > Oracle E-Business Suite Quote Lines

When creating or updating the opportunity, if these contexts do not exist in the Siebel CRM On Demand opportunity and the create quote process is initiated, then no context is passed to Oracle E-Business Suite Quoting, and the quote creation process continues uninterrupted.

Siebel CRM On Demand Opportunity Product Lines Must Exist on the Quoting Price List

All products on the Siebel CRM On Demand opportunity must exist on the Oracle E-Business Suite default price list during quote creation to be included in the quote. If one of the opportunity product lines does not exist on the default price list, the quote is not created and a pricing (QP) error is thrown to the end user.

Siebel CRM On Demand Opportunity Product Lines Must Belong to Valid Operating Unit

All products on the Siebel CRM On Demand opportunity must be associated with the logged-in user's item validation organization operating unit (Org_ID) to be included in the quote during conversion. Items that do not belong to the user's associated Item Validation Org are not added to the quote, and no warning or error messages are displayed.

Product Quantity and Product Unit of Measure

The quantity associated with the product line on the Siebel CRM On Demand opportunity is passed to the corresponding line on the Oracle E-Business Suite quote upon conversion. The Unit of Measure (UOM) for the product line is derived from the item's Primary UOM on the Oracle E-Business Suite product master.

Account Defaulting on Opportunity-to-Quote Conversion

Upon converting the Siebel CRM On Demand opportunity to an Oracle E-Business Suite quote, the associated customer account (Account Number field on the Oracle E-Business Suite Quoting General/Overview page) is displayed by default only if one account number exists for the customer. If multiple accounts exist for the customer, no account is displayed by default. The user can then go to the Quote General page and select the valid account for the customer quote.

Quote Name Derived from the Opportunity Name

During the quote creation process, the newly created quote name is derived from the Siebel CRM On Demand opportunity name. The Siebel CRM On Demand opportunity name is not displayed on the Opportunity Name field within the Oracle E-Business Suite quote.

Display Oracle E-Business Suite Quotes Associated with a Siebel CRM On Demand Opportunity

From within the Siebel CRM On Demand Opportunity Detail page, a user can review a listing of all quotes associated with the opportunity by clicking a custom Web link. This link opens an Oracle E-Business Suite page containing a summary table of all quotes associated with the opportunity within an Siebel CRM On Demand custom Web tab. The quote summary table consists of the following fixed columns:

- Quote Name (Hyperlink)
- Quote Number
- Primary Sales Person
- Status
- Creation Date
- Expiration Date
- Amount

The table is sorted by the last-update date for the quotes. The quote listing page has the Siebel CRM On Demand look-and-feel. Users can drill down on an individual quote, which launches a separate browser session in which the user can update the Oracle E-Business Suite quote.

Display Oracle E-Business Suite Quotes Associated with a Siebel CRM On Demand Customer Account

From within the Siebel CRM On Demand Account Detail page, a user can review a listing of all quotes associated with the customer account by clicking a custom Web link. This link opens an Oracle E-Business Suite page containing a summary table of quotes associated with the Siebel CRM On Demand customer account within a Siebel CRM On Demand custom Web tab.

The table is sorted by the last-update date for the quotes. The quote listing page has the Siebel CRM On Demand look-and-feel. Users can drill down on an individual quote, which launches a separate browser session in which the user can update the Oracle E-Business Suite quote.

Ability to Distinguish Between Quotes Created from Siebel CRM On Demand and Oracle E-Business Suite

Quotes generated from a Siebel CRM On Demand opportunity can be identified by displaying the Quote Overview page and checking the Opportunity Source field for the value Siebel CRM On Demand. The Opportunity Source field replaces the Opportunity Name field on both the Quote Overview page and the Quote General pages.

Quotes created from an Siebel CRM On Demand opportunity cannot be associated with an Oracle E-Business Suite opportunity, because the Opportunity Name field and LOV are replaced by the Opportunity Source field. Quotes created directly from Oracle E-Business Suite (either standalone or as part of the Oracle E-Business Suite Opportunity-to-Quote flow) have the Opportunity Name field and LOV.

Ability to Distinguish Orders Originating from a Siebel CRM On Demand Opportunity

Orders originating from an Siebel CRM On Demand opportunity are marked as such. Open the Sales Order form within Order Management and check the Order Source Reference field. Orders originating from Siebel CRM On Demand have a value of SEBL_<Siebel Opportunity ID> in that field.

Quote Listing within the Siebel CRM On Demand Custom Web Tab

You can review all quotes for which they are specified as the Primary Sales Rep, by clicking a custom Web tab, which directs them to a quote listing page. This same custom tab displays the quotes associated with the opportunities and accounts, based on the page (Account or Opportunity Detail page) from which you were directed.

The quotes listed are bound by a time parameter (number of days) within the invoking URL that dictates the number of quotes returned. For example, a time parameter set to 120 days returns quotes created within the last 120 days. If no time parameter is specified, the default is 30 days.

The Quote summary table consists of the following fixed columns:

- Quote Name (Hyperlink)
- Quote Number
- Customer Name
- Contact Name
- Account Number
- Expiration Date
- Status
- Amount

The table is sorted by the last-update date for the quotes. The quote listing page has the Siebel CRM On Demand look-and-feel. Users can drill down on an individual quote, which launches a separate browser session in which a user can update the Oracle E-Business Suite quote.

Error Handling During Quote Conversion

If an error occurs during the Siebel CRM On Demand opportunity to Oracle E-Business Suite quote conversion process, the errors are logged in the middle-tier, and the following message is displayed to the end-user:

"Quote conversion failed. Please contact your system administrator."

The message displays within the Siebel CRM On Demand custom Web tab on an Oracle E-Business Suite page.

6 Troubleshooting

This chapter describes troubleshooting and error message information for the Siebel CRM On Demand Integration Pack for Oracle E-Business Suite. It contains the following sections:

- [Error Messages on page 93](#)
- [Error Logging Database on page 93](#)
- [Resolving Errors on page 94](#)
- [NoClassDefFound Error on BPEL Process Auto-Deployment on page 96](#)
- [Siebel CRM On Demand to Oracle E-Business Suite Address Synchronization Failures on page 96](#)

Error Messages

All error messages that are displayed follow this format:

CRMI nteg - yyy- xxxxx

where:

- yyy indicates the Siebel CRM On Demand Integration Pack for Oracle E-Business Suite.
- xxxxx indicates an error message number. Numbers between 100 and 49,999 are fatal errors.

Error Logging Database

Siebel CRM On Demand Integration Pack for Oracle E-Business Suite stores errors in an error logging database. Error logs are stored in a database table for ease of retrieval and analysis. For more information on this database read [“Configuring the Error Logging Database” on page 25](#). [Table 18](#) lists the columns in the table.

Table 18. Columns in the Error Log File

Column Name	Data Type	Nullable	Column Description
CALLINGPROCESSNAME	VARCHAR2(60)	No	Stores the calling process name
CALLINGPROCESSINSTAN CEID	VARCHAR2(10)	No	Stores the calling instance name
FAULTTEXT	VARCHAR2(1000)	Yes	Stores the Fault Text
FAULTSTACK	VARCHAR2(1000)	Yes	Stores the stack Trace

Table 18. Columns in the Error Log File

Column Name	Data Type	Nullable	Column Description
FAULTCONTEXT	VARCHAR2(200)	Yes	Stores the Fault Context
PROCESSINPUTPAYLOAD	BLOB	Yes	Stores the Entire Fault Payload

Table 19 lists the error messages used in Siebel CRM On Demand Integration Pack for Oracle E-Business Suite.

Table 19. Error Messages in Siebel CRM On Demand Integration Pack for Oracle E-Business Suite

Error Code	Error Message Text
1	Encountered RemoteFault at CRMIntegSubscribeToCreateProductEBS11i10ToSEBL782
2	Encountered UnknownFault at CRMIntegSubscribeToCreateProductEBS11i10ToSEBL782
3	Insufficient inputs to process ProductCreate event
4	Encountered RemoteFault at CRMIntegSubscribeToUpdateProductEBS11i10ToSEBL782
5	Encountered unknown fault in CRMIntegSubscribeToUpdateProductEBS11i10ToSEBL782
6	Insufficient inputs to process ProductUpdate event
7	Encountered RemoteFault at CRMIntegSubscribeToBulkloadProductEBS11i10ToSEBL782
8	Encountered UnknownFault at CRMIntegSubscribeToBulkloadProductEBS11i10ToSEBL782
9	Insufficient inputs to process Product Bulkload event
10	Encountered RemoteFault in process CRMIntegSyncProductEBS11i10ToSEBL782
11	Encountered unknown fault in CRMIntegSyncProductEBS11i10ToSEBL782
12	Error during bulk data fetch for ProductSync
13	Error while fetching single item data in ProductSync process
14	Incorrect EventName passed to Product Sync process

Resolving Errors

During Siebel CRM On Demand maintenance, if the Siebel CRM On Demand server is shut down, the polling process instances has be purged and restarted after the Siebel CRM On Demand server is restarted.

In the case of a polling process (CRMIntegSEBLODPollingSchedulerAsync) failure, perform the following:

- 1 Purge all instances:
 - a From the Oracle SOA Suite main page click the link for BPEL Control.
 - b Log in as an administrative user.
 - c Click Instances tab.
 - d Click Purge All Instances.
 - e Click Delete All Instances.
 - f In the warning message, click Delete All Instances.

This step stops the Siebel CRM On Demand Polling process. When purging is complete, restart the CRMIntegSEBLODPollingSchedulerAsync process.
- 2 Clear the WSDL cache:
 - a Log in to BPEL control as an administrative user.
 - b Click the BPEL Processes tab.
 - c Click the Clear WSDL Cache link.
- 3 Clear LastPollingWindowEnd from the od_config table.
 - a Log in to the middle-tier database with the account used to create od_config table.
 - b Execute the following SQL command:


```
delete from od_config
where Name = 'LastPollingWindowEnd' ;
```
- 4 Restart SOA:
 - a Log in to Application Server Control as an administrative user.
 - b Click Expand All Application Servers
 - c Check the top level check box next to the link for middle-tier host (for example: ap6002gns.ap6002gns) and where the Type = Application Server.
 - d Click Restart > Yes.
- 5 Restart polling:
 - a From the Oracle SOA Suite main page click the link for BPEL Control.
 - b Log in as an administrative user.
 - c Click BPEL Processes tab.
 - d Click CRMIntegSEBLODPollingSchedulerAsync process.
 - e Click Initiate to start this process.
 - f Provide the following values to the process:
 - Unit = S (for seconds)

- Frequency = 3600 (for one hour)
- g WindowStart = (leave this blank to force polling to pick up from where it left off)
- h Click Post XML Message.
- i Click the Instances tab to check if the instances are getting polled.

NoClassDefFound Error on BPEL Process Auto-Deployment

If you receive a NoClassDefFound Error upon running ANT for the auto-deployment of BPEL processes, this may be related to multiple versions of ANT installed on your SOA Server. One version is likely configured for System Wide Installation and other for the current User Login. To correct the NoClassDefFound Error, run ANT with the noconfig option:

```
$ ANT --noconfig
```

Siebel CRM On Demand to Oracle E-Business Suite Address Synchronization Failures

If you notice that updates to address details on the Account and Contact records do not propagate from Siebel CRM On Demand to the Oracle E-Business Suite this may be related to the number of countries supported in Siebel CRM On Demand, that do not exist in the Oracle E-Business Suite. If a user specifies a country that exists in Siebel CRM On Demand and does not exist in the Oracle E-Business Suite, the entire address does not synchronize. Make sure that the country lists in both applications match.

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