

**Siebel CRM Integration Pack for Oracle® Order
Management 2.4: Release Notes**

Release 2.4

Part No. E15037-01

May 2009

ORACLE®

Siebel CRM Integration Pack for Oracle Order Management 2.4: Release Notes

Part No. E15037-01

Copyright © 2009, Oracle and/or its affiliates. All rights reserved.

Oracle is a registered trademark of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this software or related documentation is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS

Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, duplication, disclosure, modification, and adaptation shall be subject to the restrictions and license terms set forth in the applicable Government contract, and, to the extent applicable by the terms of the Government contract, the additional rights set forth in FAR 52.227-19, Commercial Computer Software License (December 2007). Oracle USA, Inc., 500 Oracle Parkway, Redwood City, CA 94065.

This software is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications which may create a risk of personal injury. If you use this software in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy and other measures to ensure the safe use of this software. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software in dangerous applications.

This software and documentation may provide access to or information on content, products and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third party content, products and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third party content, products or services.

Contents

Value Proposition for Siebel CRM Integration Pack for Oracle Order Management 2.4	2
Product Enhancements for Siebel CRM Integration Pack for Oracle Order Management	4
Siebel CRM Integration Pack for Oracle Order Management Features	7
Process Integration for Customer Management Features	9
Process Integration for Product Management Features	11
Process Integration for Price Lists Features	12
Process Integration for Quotes Features	13
Available to Promise Check Integration Flow Features	14
Shipping Charges Integration Flow Features	16
Credit Check Integration Flow Features	18
Payment Authorization Integration Flow Features	20
Process Integration for Order Management Features	22
Process Integration for Asset Management Features	23
Oracle Configurator Features	24
Interoperability of AIA Process Integration Packs Features	24
Additional Resources	26

Value Proposition for Siebel CRM Integration Pack for Oracle Order Management 2.4

This document provides an overview of the value proposition for the Siebel CRM Integration Pack for Oracle Order Management 2.4. It is a roadmap that is intended to help you assess the business benefits of Siebel CRM Integration Pack for Oracle Order Management 2.4 and plan your information technology (IT) projects and investments.

The new features and enhancements that are planned for this release are grouped according to licensed product. This document describes new or changed functionality only. Existing functionality from prior releases is not described.

Our goal is to ensure that you leverage technology to its fullest to increase the efficiency and effectiveness of your operations. The final release may not have every feature that is discussed in this document, and a specific feature may become a part of a different application or have a product name that is different from those cited in this document.

The information provided in this document is intended to outline our general product direction and is intended for information purposes. The development, release, and timing of any features or functionality described for Oracle's products remains at the sole discretion of Oracle.

The Siebel CRM Integration Pack for Oracle Order Management combines Siebel CRM's campaign-to-order functionality with Oracle E-Business Suite's robust order management and fulfillment capabilities giving you a single view of your order to cash business process.

For added configurability, extensibility, and sustainability, the Order to Cash Process Integration Pack (PIP) 2.4 has been built on the Application Integration Architecture (AIA) Foundation Pack methodology and architecture, giving customers a standards-based, best-practice order to cash business process.

Key features include:

- Pre-built business process maps to enable complete order capture to cash flow.
- Embedded Oracle Configurator in Siebel CRM Order Capture.
- Synchronized customer, product, pricing and install base information.
- Adaptable and extendable to meet your requirements.

Key benefits include:

- Provides a complete campaign-to-cash business process
- Reduced implementation costs with OOTB maps and business processes
- Enhanced customer visibility with status updates to Siebel from Oracle eBS
- Increased efficiency for goods and services lifecycle management with support for different order types including RMAs
- Decreases time to market for new products
- Ensure consistent product and pricing definitions with product synchronization

- Enhanced cross/up selling with best of breed Siebel Order Capture
- Increase fulfillment and manufacturing efficiency with best of breed Oracle
- Enables Faster time to revenue
- Reduced order errors through elimination of manual front to back office transformation
- Faster order processing with call-outs to eBS ATP, Shipping, Payments, Credit Check

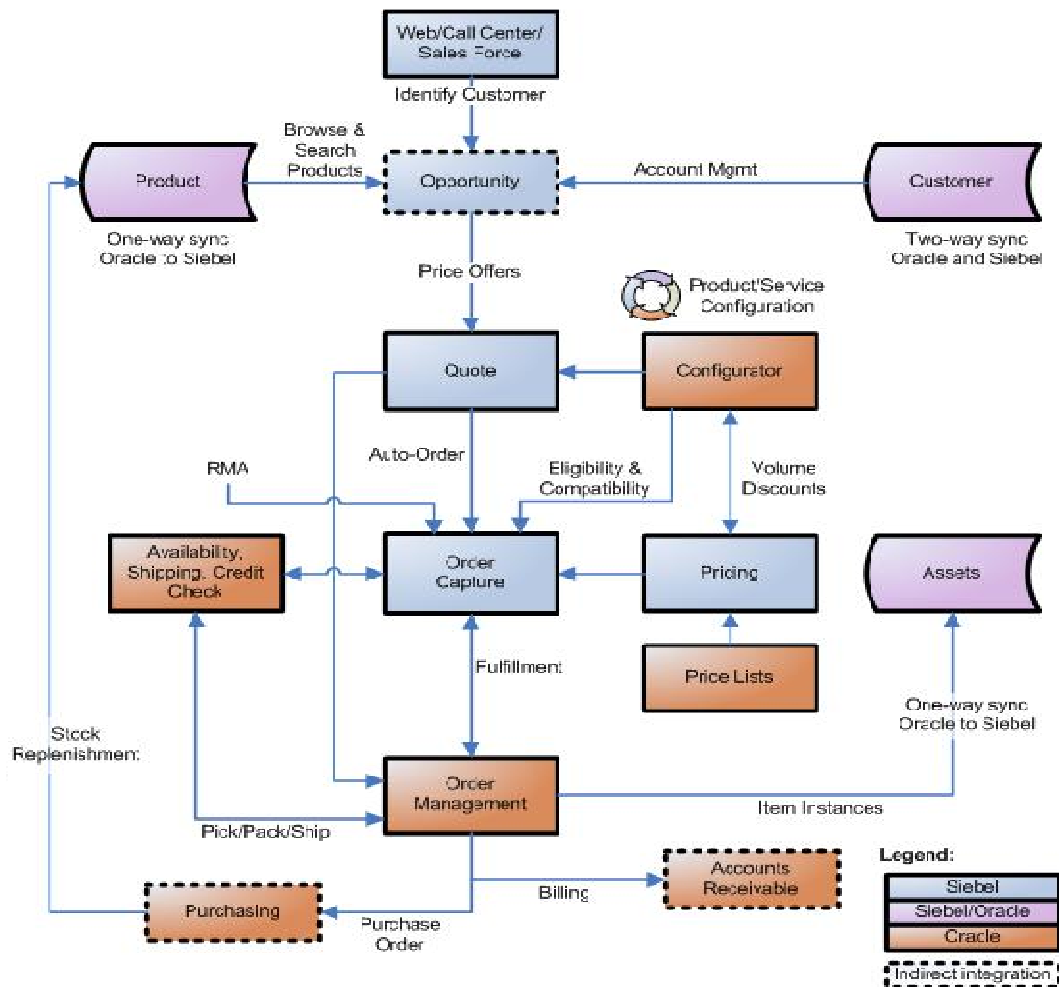
Oracle AIA replaces traditional enterprise application integration with flexible, pre-built, standards-based business process integration solutions. As an AIA offering, the Order to Cash PIP includes all of the necessary business process models, canonical objects, and web services you need out-of-the-box. Now you can quickly orchestrate a sustainable order to cash business process across Siebel CRM and Oracle E-Business Suite with reduced cost and risk. Plus, the AIA adaptable framework enables you to extend the integration to accommodate your specific business needs.

Product Enhancements for Siebel CRM Integration Pack for Oracle Order Management

No functional enhancements are planned for this release. However, this release contains two primary changes:

- We are certifying against Siebel CRM 8.0.0.7 SIA and Oracle E-Business Suite R12.1.1, Siebel CRM 8.0.0.7 SIA, and Oracle E-Business Suite R11.i.10 CU2.
- Functional interoperability with the Customer Hub and Product Hub MDM PIPs is certified with this release.

Siebel CRM Integration Pack for Oracle Order Management supports the Order to Cash business process as outlined in the following diagram:



Order to cash business process

Siebel CRM Integration Pack for Oracle Order Management supports the following functional flows:

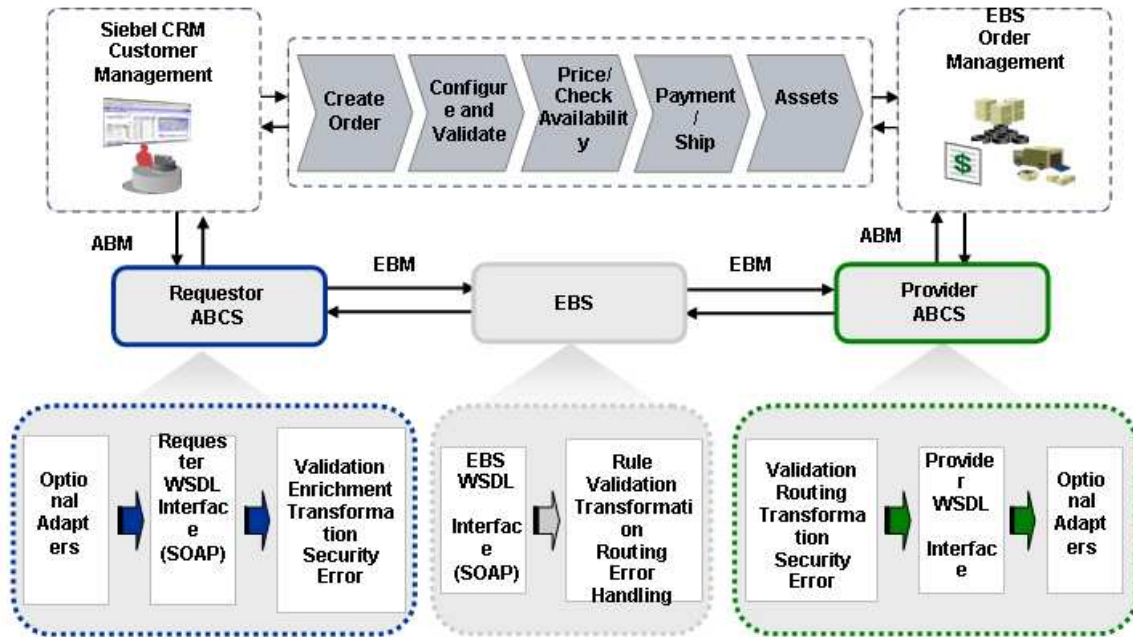
- Customer Initial Load, Update, and Transactional Synch
- Product Initial Load and Update Synch
- Asset Initial Load and Transactional Synch
- Price List Initial Load and Update Load
- Quotes/Orders Transactional Synch
- Check ATP
- Get Shipping Cost
- Perform Credit Check
- Authorize Payment
- Configurator
- RMA

Siebel CRM Integration Pack for Oracle Order Management provides the following integration points:

- Create Customer
- Update Customer
- Merge Customer
- Create Simple Product
- Update Simple Product
- Create Product Hierarchy
- Configure Product
- Create Order
- Update Order Status
- Create Price List
- Update Price List
- Create Asset
- Update Asset
- ATP Check
- Credit Check
- Payment Authorization
- Calculate Shipping Charge

- Load Customers (initial)
- Load Products (initial)
- Load Assets (initial)
- Load Pricelists (initial)

The following high level architectural diagram represents the Siebel CRM Integration Pack for Oracle Order Management PIP:



High level architecture

The Siebel CRM Integration to Oracle Order Management uses the following Enterprise Business Objects:

- Sales Order EBO
- Customer Party EBO
- Item EBO
- Item Composition EBO
- Installed Product EBO
- Received Payment EBO

Siebel CRM Integration Pack for Oracle Order Management Features

The Order to Cash Process Integration Pack (PIP) provides a seamless and robust order to cash business process. Leveraging the best front office with the best back office applications, this PIP provides a streamlined order to cash business process that enables faster time to market for new products and faster time to revenue.

A quote or order created in Siebel Quote and Order Capture can generate an order in Oracle EBS Order Management. The order to cash flow consists of master data flows and transactional flows. For master data, customer account data is synchronized bi-directionally, while product (item or bill of material [BOM]) data is synchronized from the Oracle EBS product master.

The transactional flows are: Available to Promise (ATP), Credit Check, Payment Authorization, Shipping Charges, Quotes, and the Order integration flow.

The integration pack includes additional touch points between Siebel CRM and Oracle EBS that are required to enable this process: loading price lists and synchronizing assets.

The integration pack also provides the ability to invoke the Oracle Configurator, either from a Siebel quote or an order. This approach eliminates the costly and complex maintenance of configuration rules in CRM and ERP. Also, it leverages a customer's existing investment in Oracle Configurator.

This business process helps an organization:

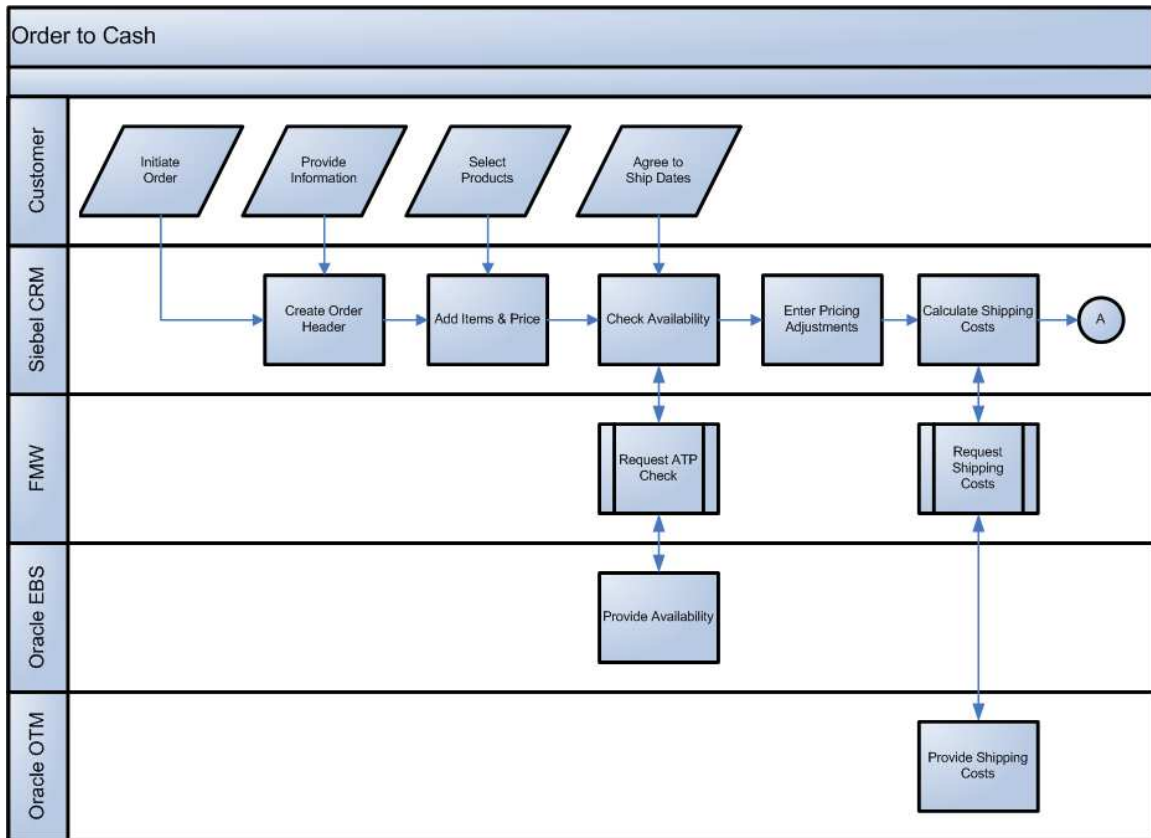
- Eliminate order fallout by making sure that products are correctly configured and available before the order is confirmed.
- Increase customer satisfaction by making sure that the order is priced correctly.
- Reduce customer callbacks by providing order availability and status.
- Decrease time to market for new products.
- Enable faster time to revenue.
- Reduce implementation costs by means of delivered mappings and business processes.

The Order to Cash PIP consists of these integration flows:

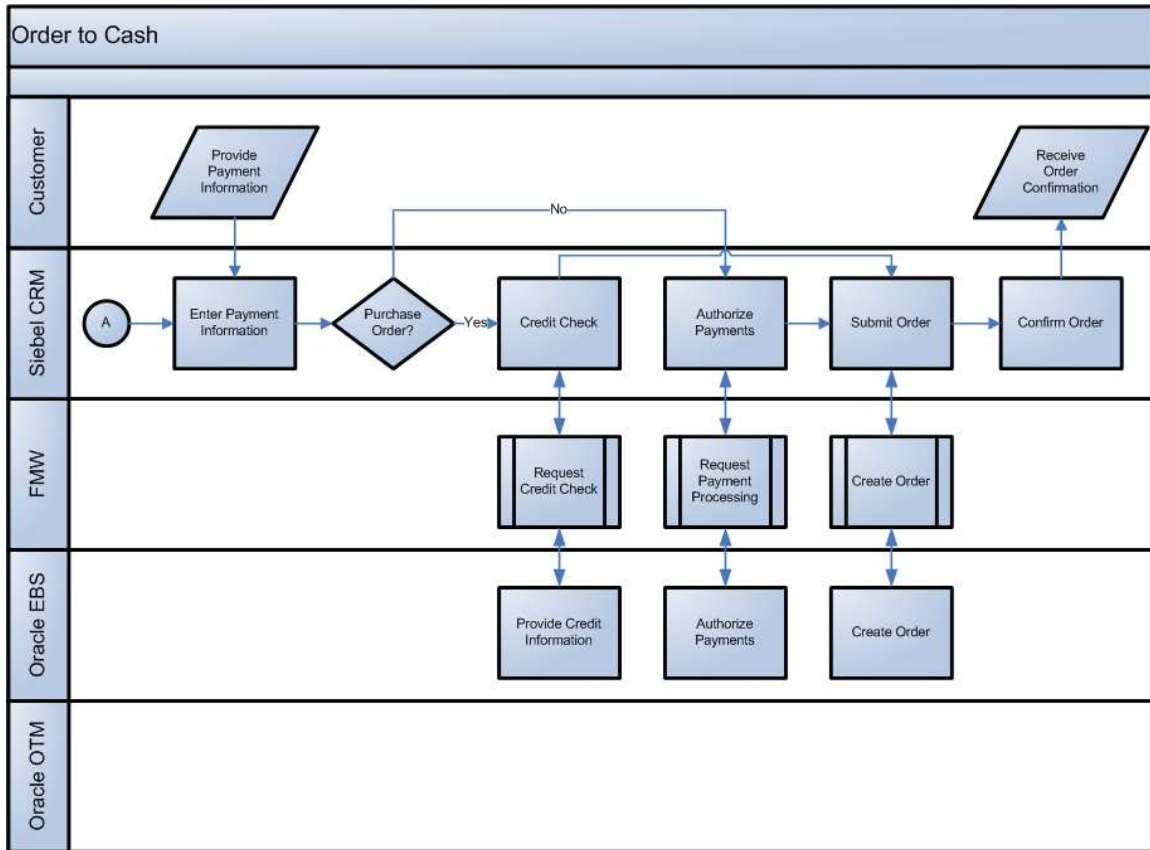
- Initial bulk data loading integration flows for Customers, Products, Price Lists, and Assets.
- Customer Management.
- Product Management.
- Price List Management.
- Process Integration for Quotes.
- Service calls: Available to Promise, Credit Check, Payment Authorization, and Shipping Charges.
- Order Management.

- Asset Management.

These diagrams illustrate the Order to Cash business process flow:



Order to Cash business process flow (1 of 2)



Order to Cash PIP business process flow (2 of 2)

Process Integration for Customer Management Features

The process integration flow for customer management:

- Supports bi-directional synchronization.
- Sends new customer address info to Oracle EBS only if used to place an order.
- Supports customer merge in Oracle EBS, is synchronized to Siebel CRM.

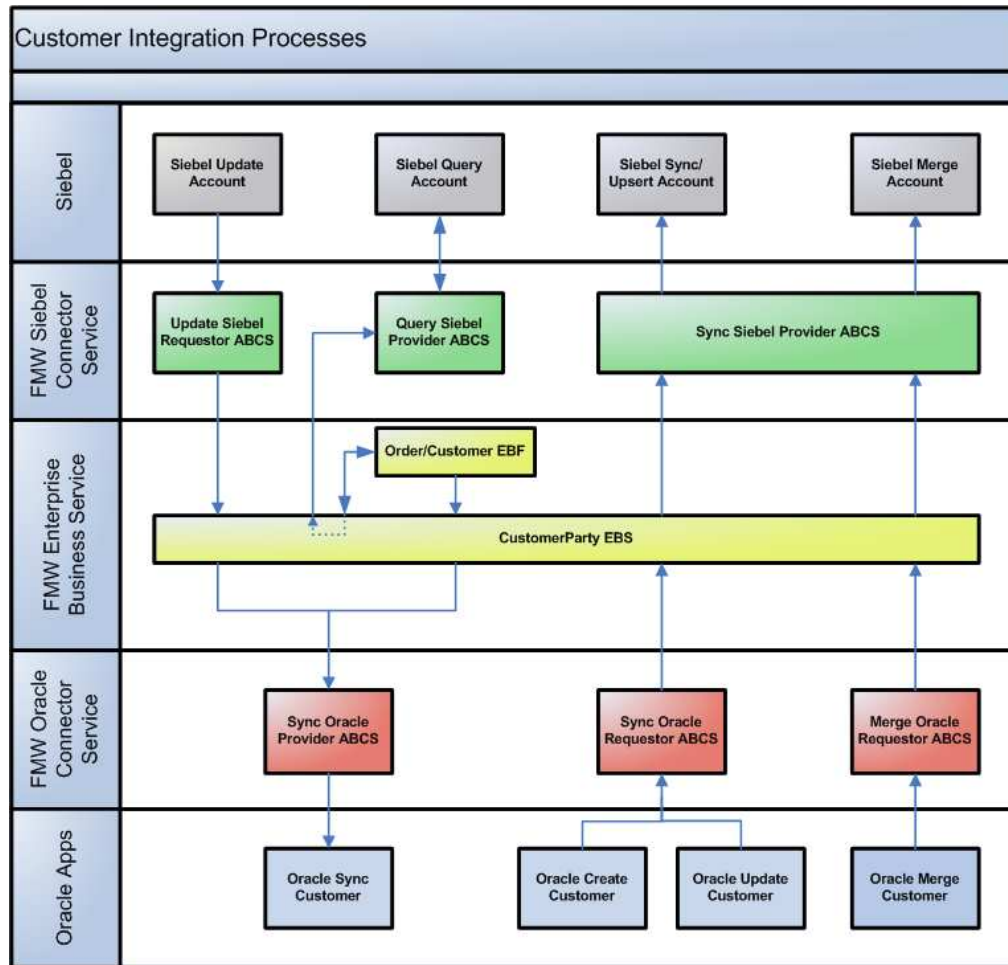
The process integration for customer management provides the following integration flows:

- **Synchronize new customer accounts from Siebel CRM to Oracle EBS** enables the synchronization of new customer accounts from Siebel CRM to Oracle EBS as part of booking an order in the process integration for Order Management.
- **Update and synchronize customer accounts from Siebel CRM to Oracle EBS** enables the synchronization of customer updates from Siebel CRM to Oracle EBS if the record exists in both Siebel CRM and Oracle EBS. If a customer record that does not exist in Oracle EBS is updated, the customer record will not be synchronized to Oracle EBS.
- **Synchronize customer accounts from Oracle EBS to Siebel CRM** enables the synchronization of customer accounts from Oracle EBS to Siebel CRM. Whenever a new

customer account is created in Oracle EBS, a real-time synchronization flow is initiated to synchronize the related party and customer account to a new Siebel customer account.

- **Merge accounts** maintains the transactional integrity essential to convert orders captured in Siebel CRM into booked orders, despite customer merge events that may occur within Oracle EBS. This flow is initiated in Oracle EBS when a customer account is merged into another customer account. The merge operation is then performed in Siebel CRM.
- **Merge parties** is initiated in Oracle EBS when an organization party is merged into another party. All of the child records that belong to the surviving party in the fulfillment system are synchronized to Siebel CRM after the merge.
- **Bulk load of customer data** enables the extract, transformation, and load of initial customer data from Oracle EBS to Siebel CRM. This feature uses Oracle Data Integrator (ODI) to extract relevant customer data from Oracle EBS, and load it to the appropriate Siebel CRM EIM tables, to be inserted into base tables. This process also enables cross-referencing between Oracle EBS and Siebel CRM.

This diagram illustrates the overall flow for the customer process integration:



Customer process integration flow

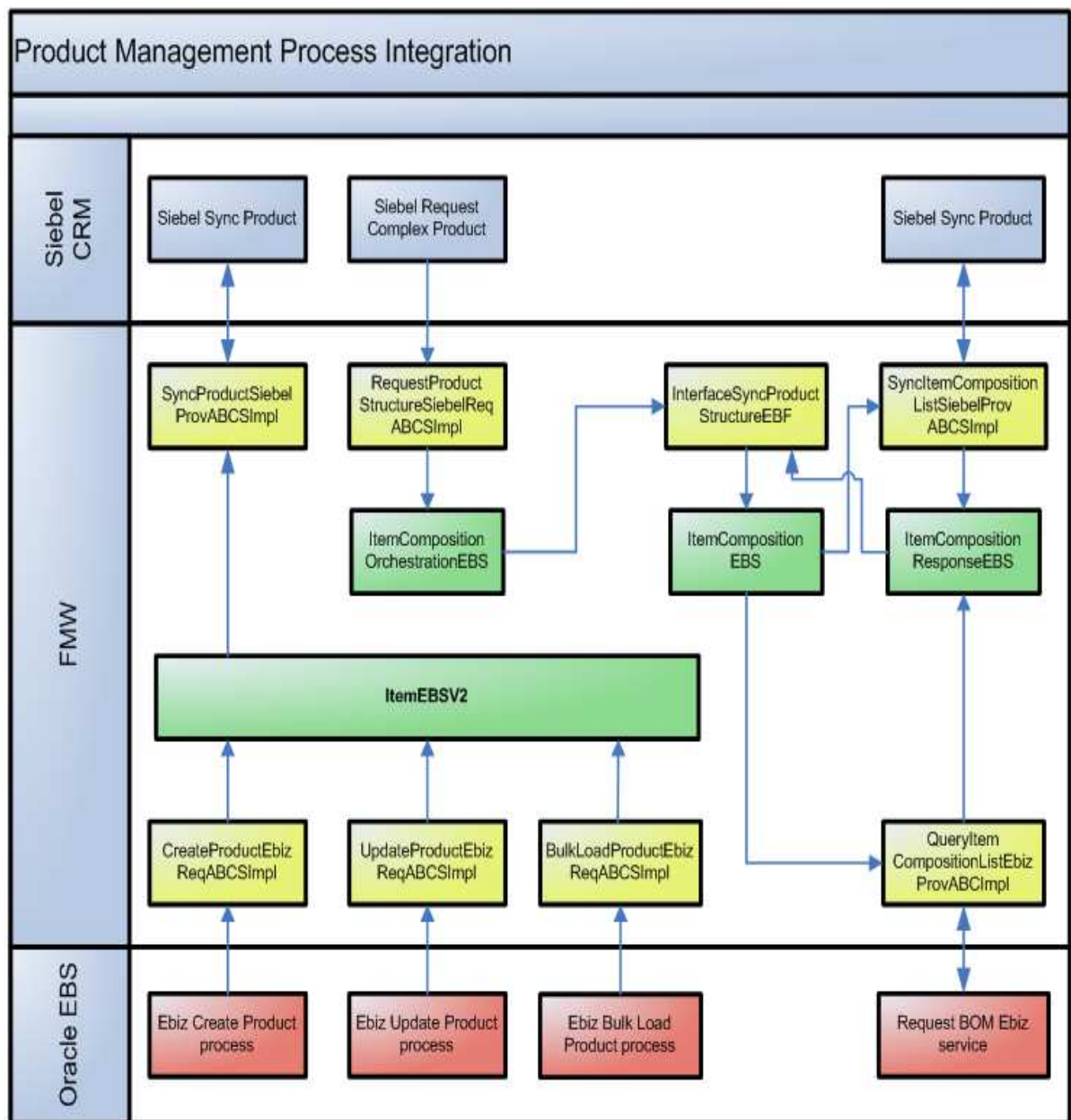
Process Integration for Product Management Features

For the process integration flow for product management, Oracle EBS serves as the product master. Product hierarchy is synchronized to Siebel CRM.

The process integration for product management supports the following integration flows:

- **Synchronize Items** enables the synchronization of items from Oracle EBS to simple products in Siebel CRM. This one-way feed from Oracle EBS to Siebel CRM is initiated by Oracle EBS to create or update an item from Oracle EBS to a simple product in Siebel CRM.
- **Synchronize BOMs** enables the synchronization of BOM structures from Oracle EBS to complex products in Siebel CRM. This process replicates a new or updated BOM from Oracle EBS to Siebel CRM as a configurable or customizable product. This one-way feed from Oracle EBS to Siebel CRM is initiated by Siebel CRM to create or update a configurable or customizable product in Siebel CRM.
- **Initial load of Items** enables the extract, transformation, and load of items from Oracle EBS to Siebel CRM. This feature uses Oracle Data Integrator (ODI) to extract relevant item information from Oracle EBS and map it to Siebel CRM interface tables. This process also enables item cross-referencing between Oracle EBS and Siebel CRM.

This diagram illustrates the overall integration flow for the product management:



Product management integration flow

Process Integration for Price Lists Features

For the process integration flow for price list management, Oracle pricelists are synchronized to Siebel CRM.

The process integration flow for price lists is different from the other integrations in the Order to Cash PIP. The price list integration flow provides an initial bulk load process and an incremental load process that both use Oracle Data Integrator (ODI) to update price list data from Oracle EBS to Siebel CRM.

The price list integration between Oracle EBS and Siebel CRM supports the following integration flows:

- **Initial or bulk load** enables the extract, transformation, and load of initial price list data from Oracle EBS to Siebel CRM. This feature uses ODI to extract relevant data from EBS and map it to CRM interface tables. This process also enables cross-referencing between EBS and CRM.
- **Incremental load** moves new price lists and lines or updates to existing price lists from Oracle EBS into Siebel CRM for use in the order capture process.

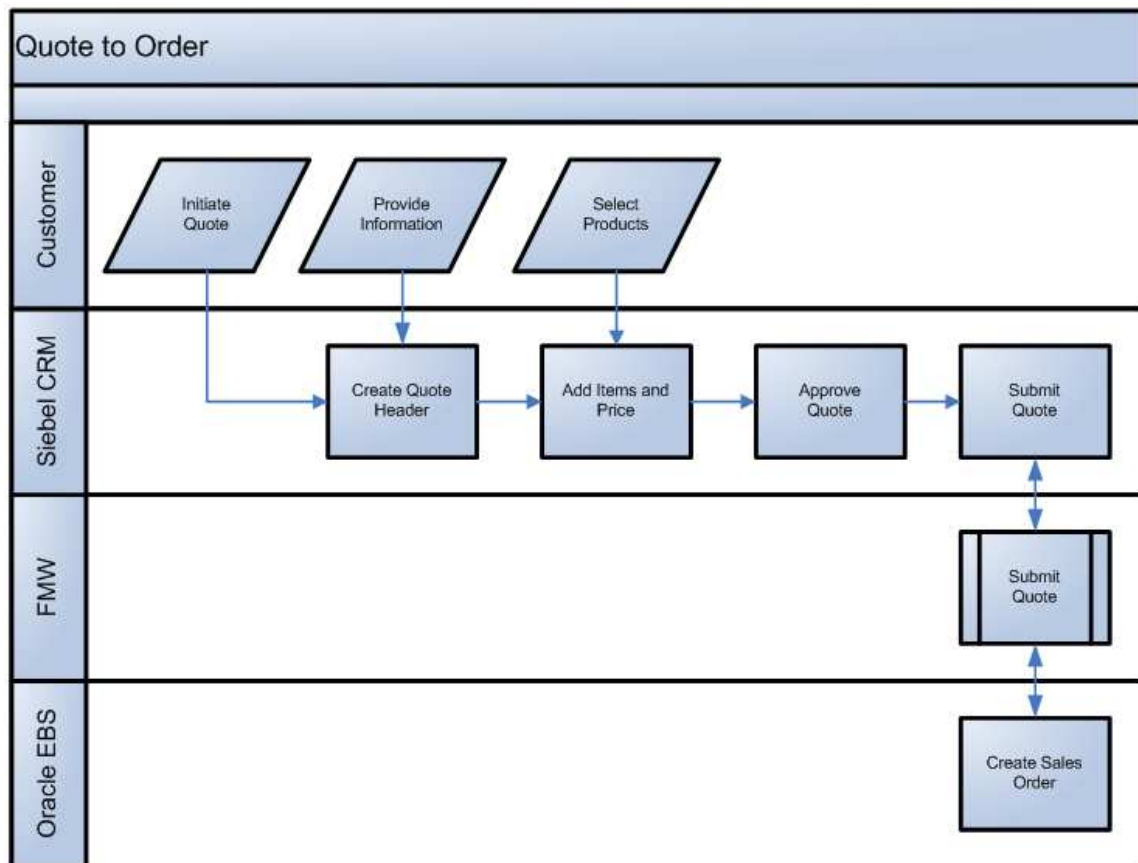
Process Integration for Quotes Features

The process integration for quotes enables companies to negotiate sales with prospects based on a variety of factors, such as product and price. You use Siebel CRM to capture quotes. Since Siebel CRM also handles pricing, you can create and display quotes immediately. After a quote is approved, it can be sent to the back office for order fulfillment. After a quote is submitted to the back office, no further updates can be made in Siebel CRM.

The quote integration flow can enable the customer management process integration flow, if needed. If a quote has customer information that has not yet been created in the back office, the customer information is synchronized before the quote is created in the back office.

Quotes can consist of simple products or configurable products. When a quote has configurable products, it is customized using Oracle Configurator. Siebel CRM and Oracle Configurator are seamlessly integrated.

This diagram illustrates the flow for the Quotes process integration:



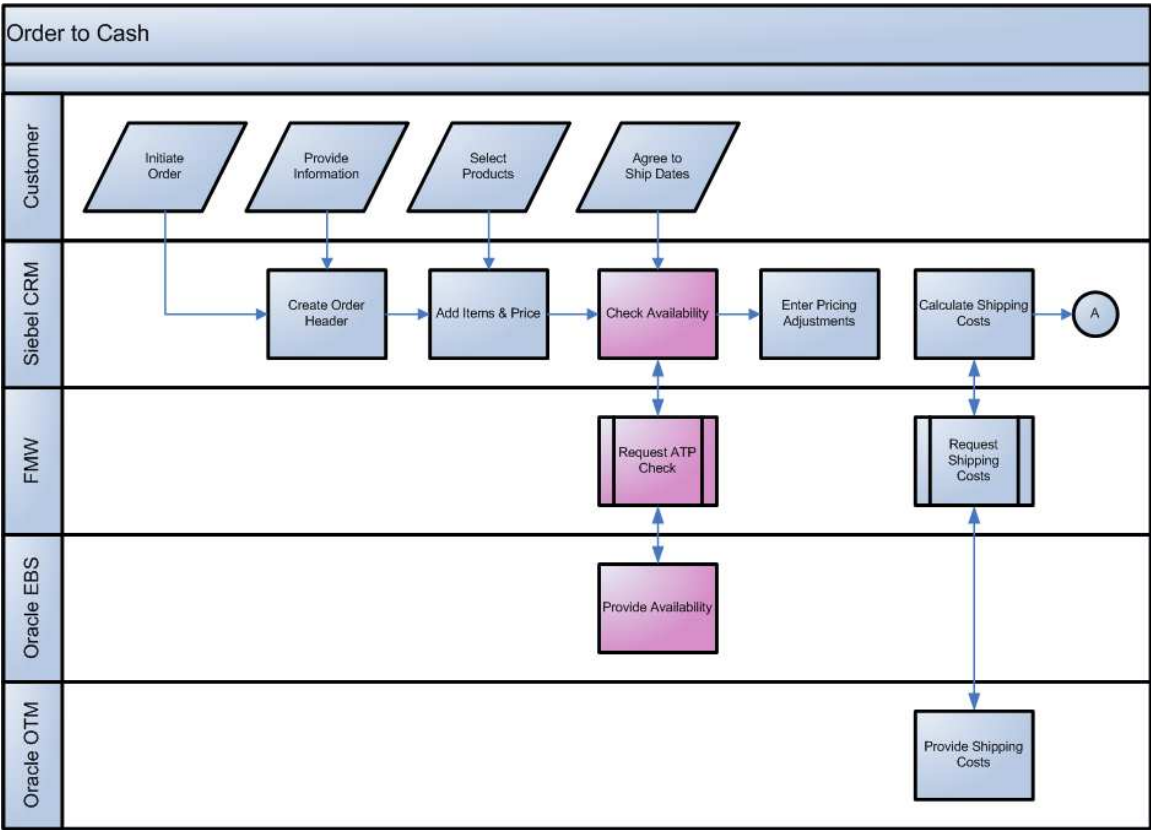
Quotes process integration flow

Available to Promise Check Integration Flow Features

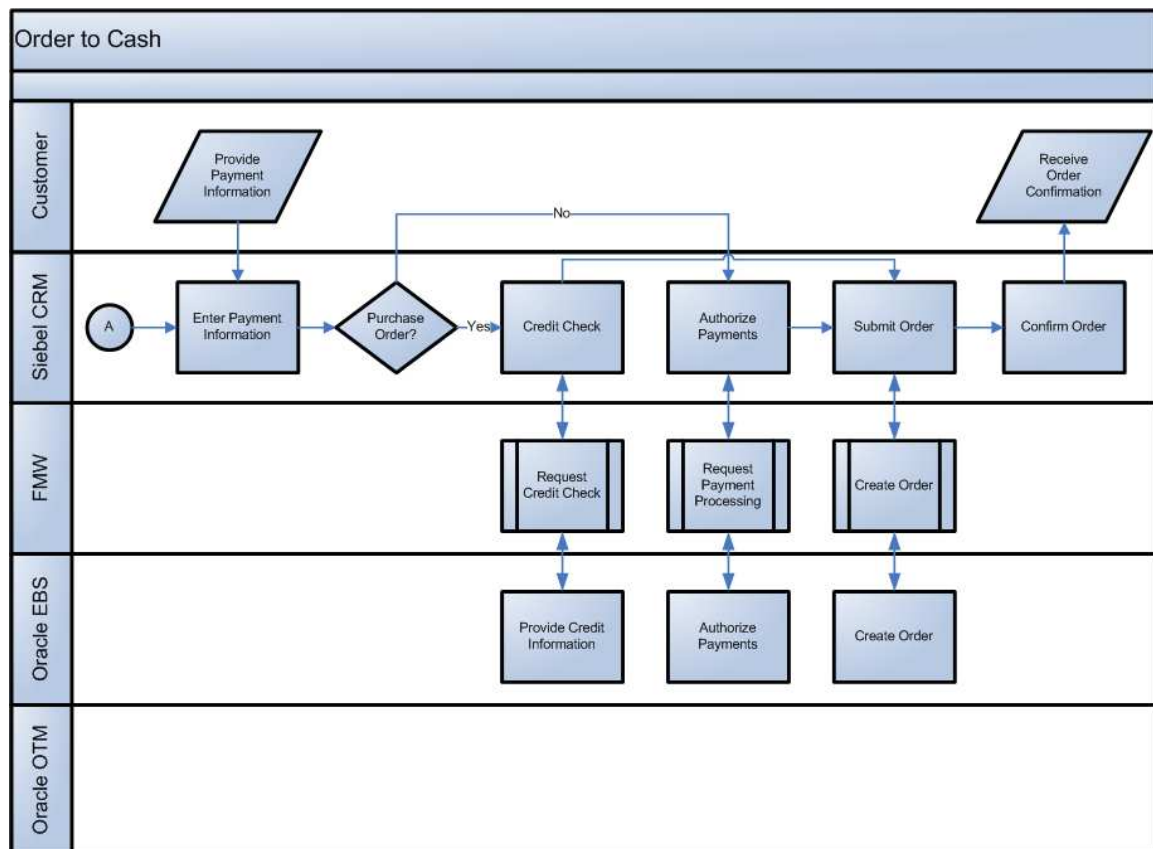
The ATP check integration flow initiates in Siebel CRM and obtains product availability quantities and dates from Oracle EBS. This data is returned to Siebel CRM so that a Customer Service Representative can inform the customer and continue with the order creation process. Calling the ATP check integration flow before an order is submitted increases the chances of successfully fulfilling the order from the back office. Thus, correct setting of customer expectations increases customer satisfaction.

The product ID, requested date, and quantities are sent to Oracle EBS to check the available inventory. Oracle EBS can return a promise date and quantity, or it can present multiple promise dates if the desired quantity is not available on the requested date. ATP information can be requested for an order line or for an entire order. Reservations are not supported.

The following diagrams illustrate the where ATP Check integration flow fits in the Order to Cash integration flow:



ATP Check integration flow (1 of 2)



ATP Check integration flow (2 of 2)

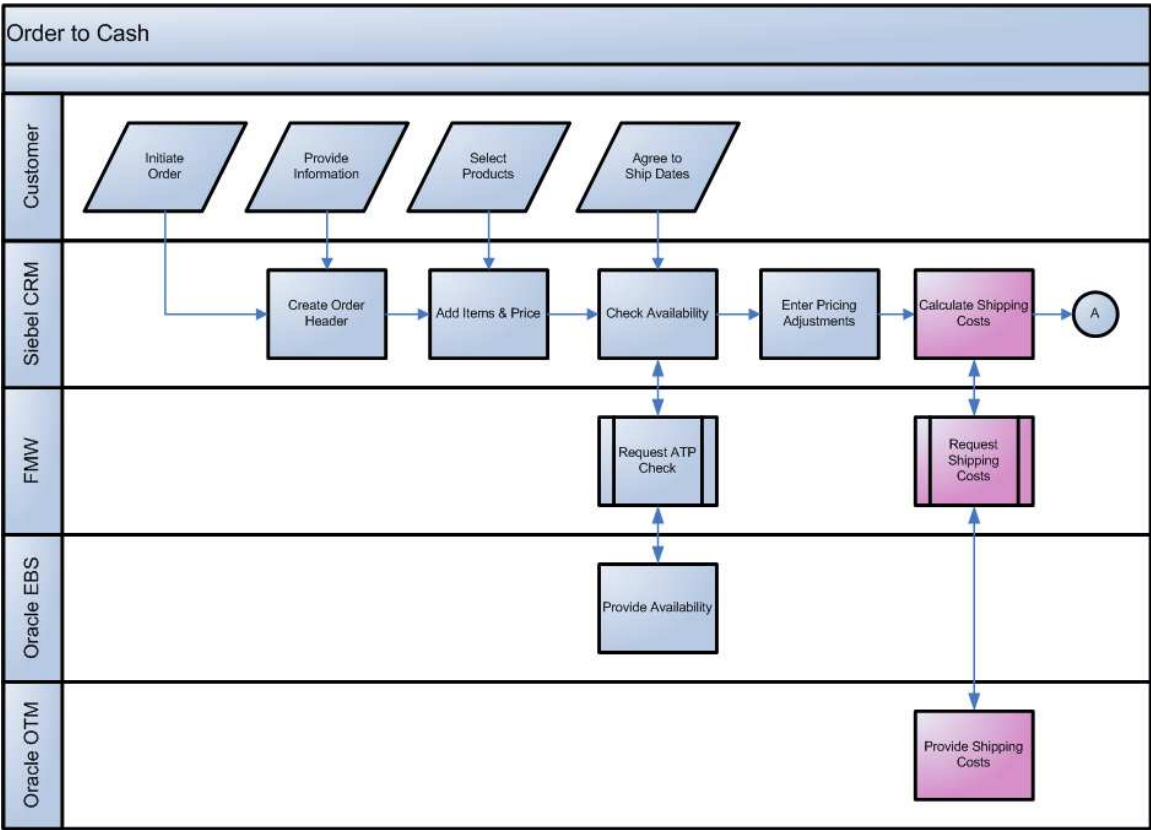
Shipping Charges Integration Flow Features

The shipping charges integration flow can be called on request, prior to submitting the create order integration flow. The shipping charges integration flow is initiated in Siebel CRM and obtains the estimated shipping cost from Oracle EBS. The source address, destination address, and weight information is passed to Oracle Transportation Management (OTM) to calculate the shipping charges. OTM responds with an amount, and this data is returned to Siebel CRM so that a Customer Service Representative can inform the customer and continue with the order creation process.

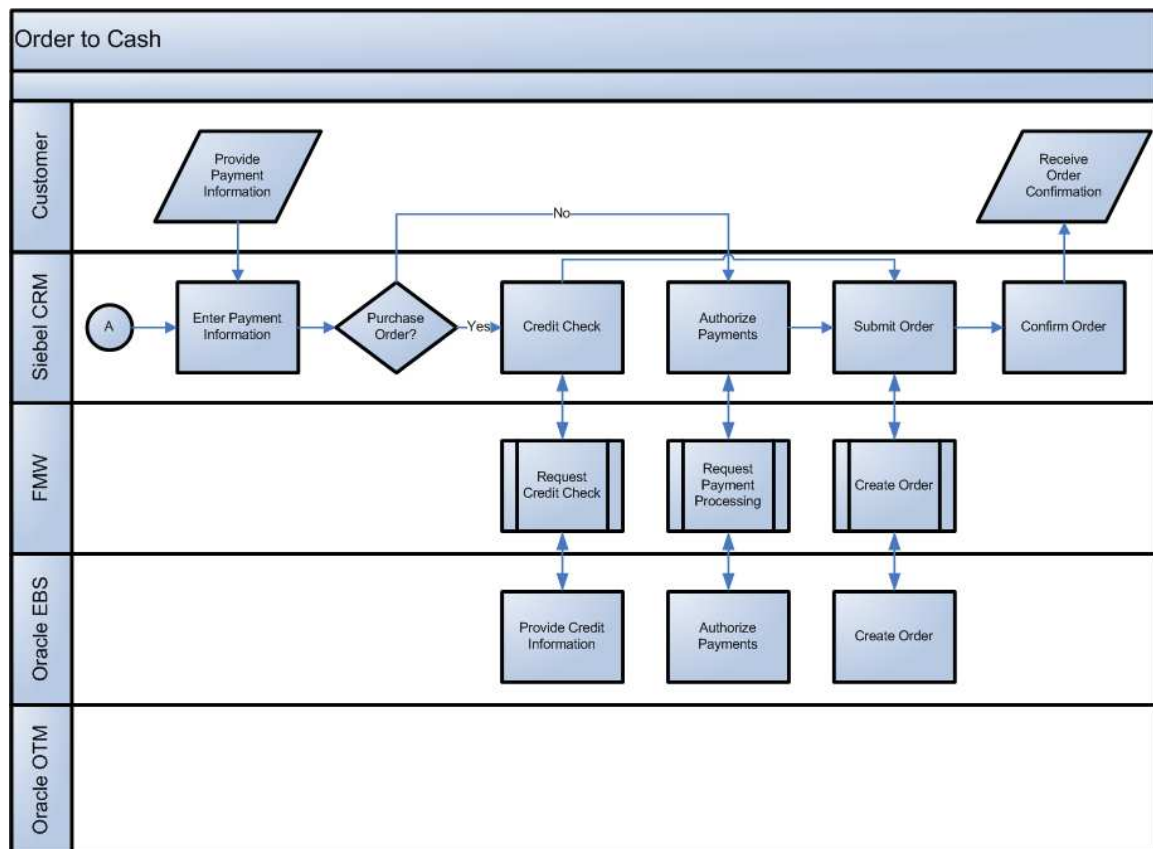
The cost setup is maintained in OTM for all shipping locations (source and destination). The integration flow provides support for weight-based calculations only; the weight must be manually entered in Siebel CRM, and it is not included in the product synchronization integration flow.

The address, weight, and inventory source information are transferred to OTM to calculate and return the shipping charge amount. The actual freight charge calculations occur only at the time of shipping in Oracle EBS.

These diagrams illustrate where the Shipping Charges integration flow fits in the Order to Cash integration flow and:



Shipping Charges integration flow (1 of 2)



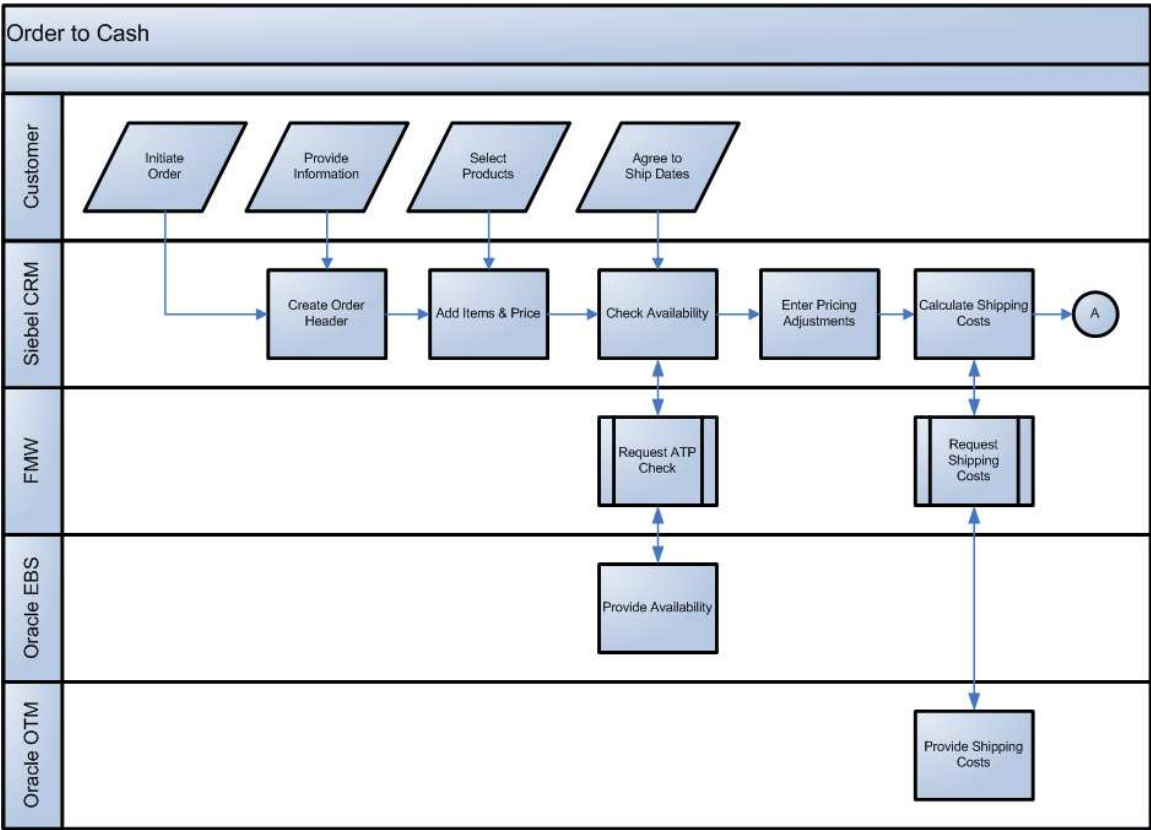
Shipping Charges integration flow (2 of 2)

Credit Check Integration Flow Features

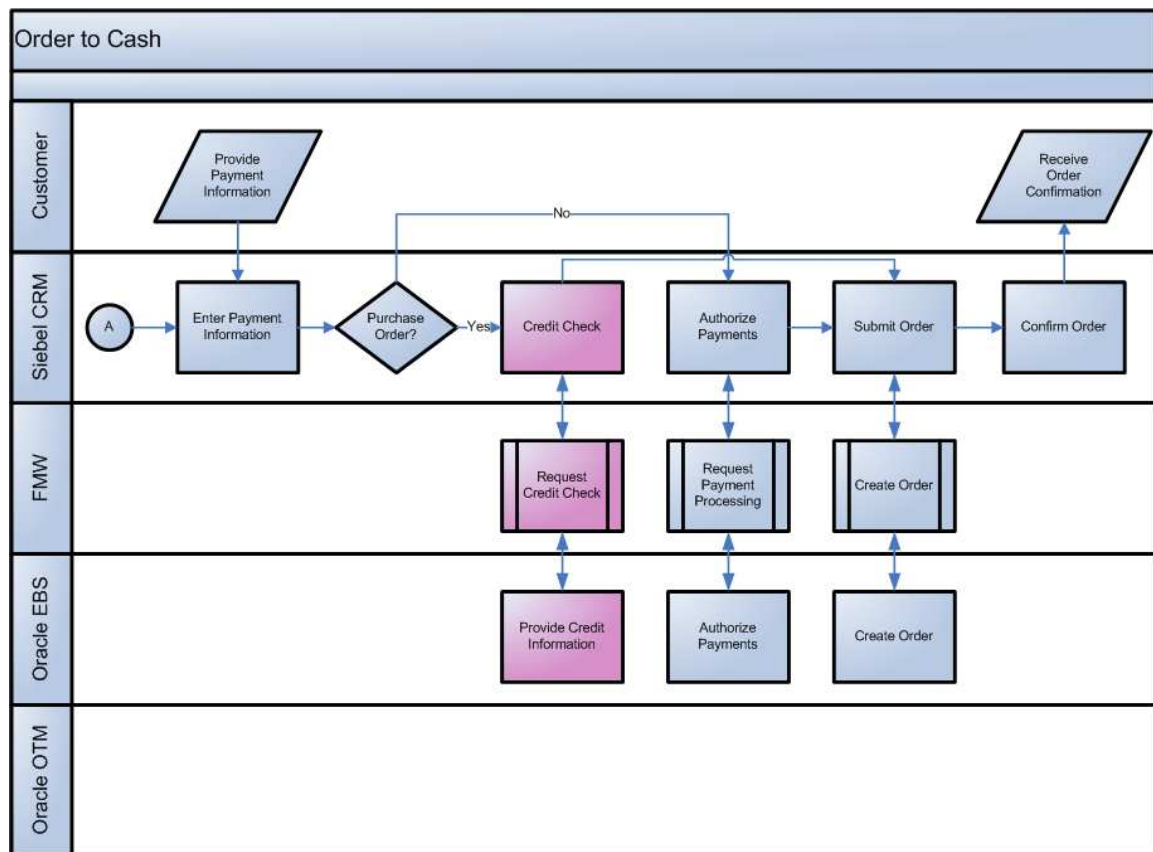
If the order payment method is by purchase order, then the credit check integration flow can be invoked before calling the create order integration flow. The credit check integration flow is a synchronous call, initiated in Siebel CRM, that obtains the credit check status from Oracle EBS. The account ID and order amount are passed to Oracle EBS to check if the order needs to be on credit hold. Oracle EBS responds with a message to either put the order on hold or not. This data is returned to Siebel CRM so that a Customer Service Representative can inform the customer. The order will not be sent to the back office until the hold is removed in Siebel CRM and the order is resubmitted.

If the credit check fails, then the hold flag is set to true and the purchase order payment status is set to rejected. When an order is submitted to Oracle EBS, if the hold flag is enabled, or if the purchase order status is not set to approved, then the order is not submitted to the back office system for fulfillment.

These diagrams illustrate where the Credit Check integration flow fits in the Order to Cash integration flow:



Credit Check integration flow (1 of 2)



Credit Check integration flow (2 of 2)

Payment Authorization Integration Flow Features

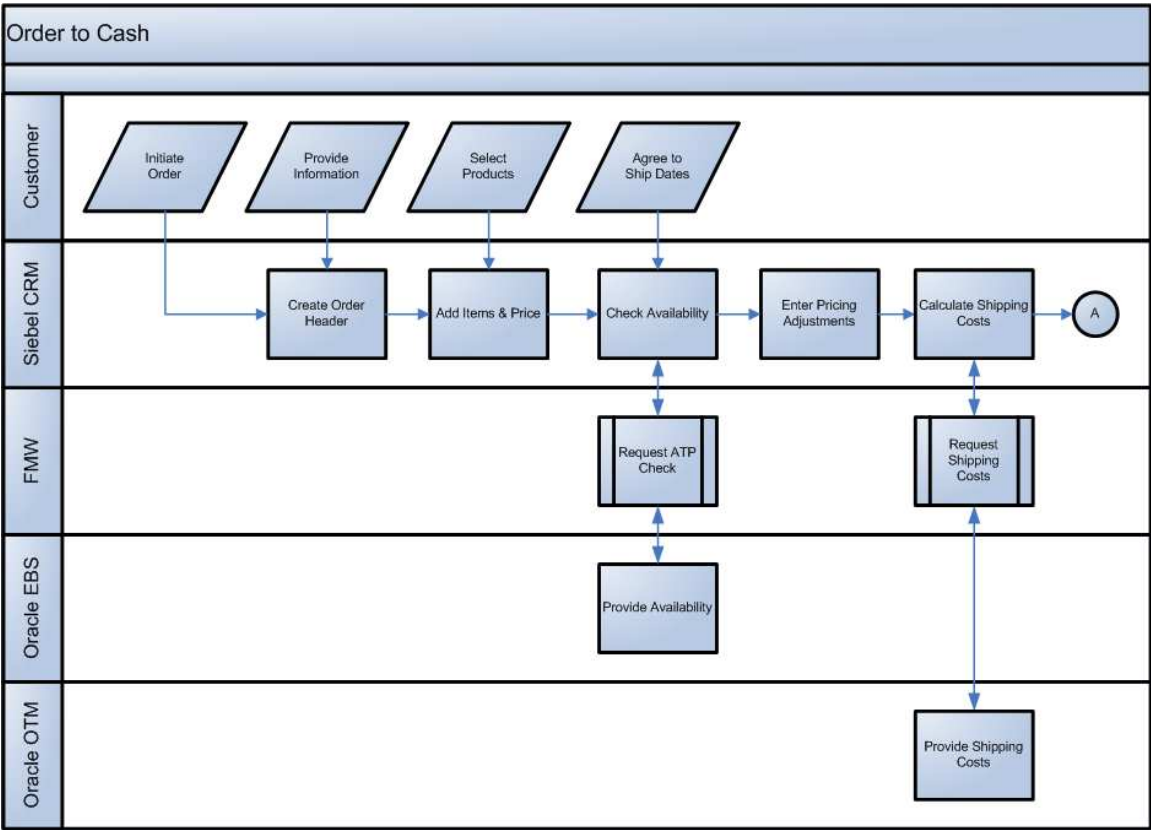
If the payment method is by credit card, then the payment authorization integration flow can be called on request before calling the create order integration flow.

The payment authorization integration flow is a synchronous call, initiated in Siebel CRM, that obtains the credit authorization status from Oracle EBS. The credit card details and order amount are passed to Oracle EBS to authorize the payment for the order amount. Oracle EBS responds with a message that indicates if the amount was charged to the credit card or if it failed authorization. This data is returned to Siebel CRM so that a Customer Service Representative can inform the customer. The order will not be sent to the back office until the payment authorization is successful.

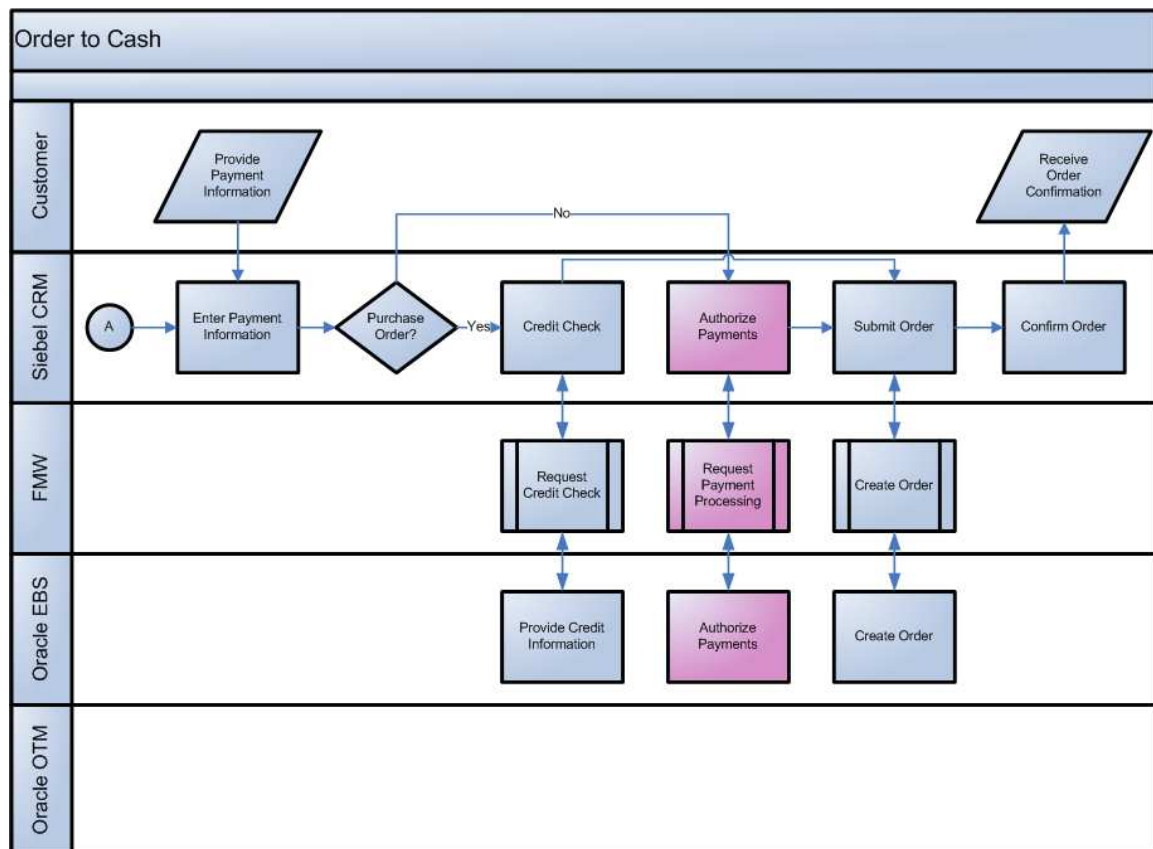
Only one credit card is supported per order. If the credit authorization fails, the status is set to rejected. An order cannot be submitted for fulfillment if the credit authorization fails.

This Payment Authorization integration flow applies to integration with Oracle EBS 11i10 only.

These diagrams illustrate where the Payment Authorization integration flow fits in the Order to Cash integration flow:



Payment Authorization integration flow (1 of 2)



Payment Authorization Integration Flow (2 of 2)

Process Integration for Order Management Features

Customer care associates and CSRs use Siebel CRM for all external customer and dealer facing applications. Oracle EBS is used for order fulfillment and billing. All orders from different channels such as web, partner portal, and EDI are created through Siebel CRM first.

Once the Order is confirmed (booked) in Siebel CRM, it is interfaced to Oracle EBS through AIA PIP. After an order is interfaced from Siebel CRM to Oracle EBS, any subsequent changes to the order originating in Siebel CRM or in Oracle EBS need to be synchronized between Siebel CRM and Oracle EBS.

Siebel Order Capture calls Oracle EBS for ATP, credit check, payment authorization, and estimated shipping charges. Orders are synchronized to Oracle EBS for fulfillment. Order status is synchronized back to Siebel CRM at the header and line levels.

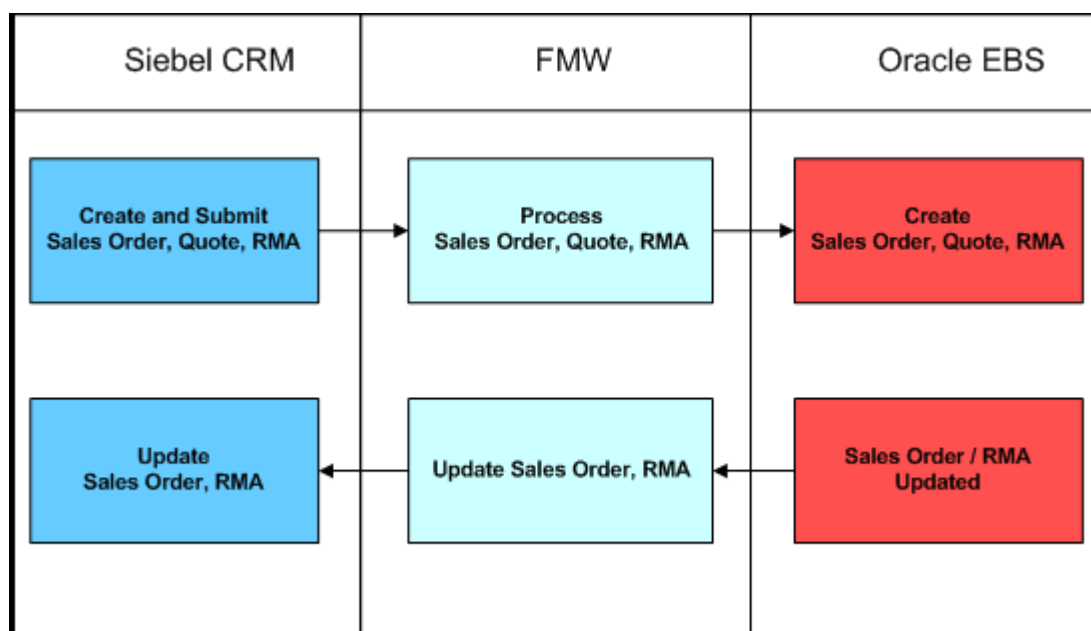
The process integration for order management supports the following integration flows:

- **Create sales orders** enables the synchronization of orders from Siebel CRM to Oracle EBS.
- **Update sales orders** enables the synchronization of order updates from Oracle EBS to Siebel CRM.

The process integration for order management uses the following service calls:

- **Available to Promise (ATP)** check, initiated from Siebel CRM, provides information about when a product can be fulfilled from Oracle EBS.
- **Credit Check**, initiated from Siebel CRM, obtains credit status information for purchase orders from Oracle EBS.
- **Payment Authorization**, initiated in Siebel CRM, obtains the authorization status for credit cards from iPayment.
- **Shipping Charges**, initiated in Siebel CRM, obtains the estimated shipping cost from Oracle Transportation Management (OTM), formerly GLOG.

This diagram illustrates the overall flow for the process integration:



Order Management overall integration flow

Process Integration for Asset Management Features

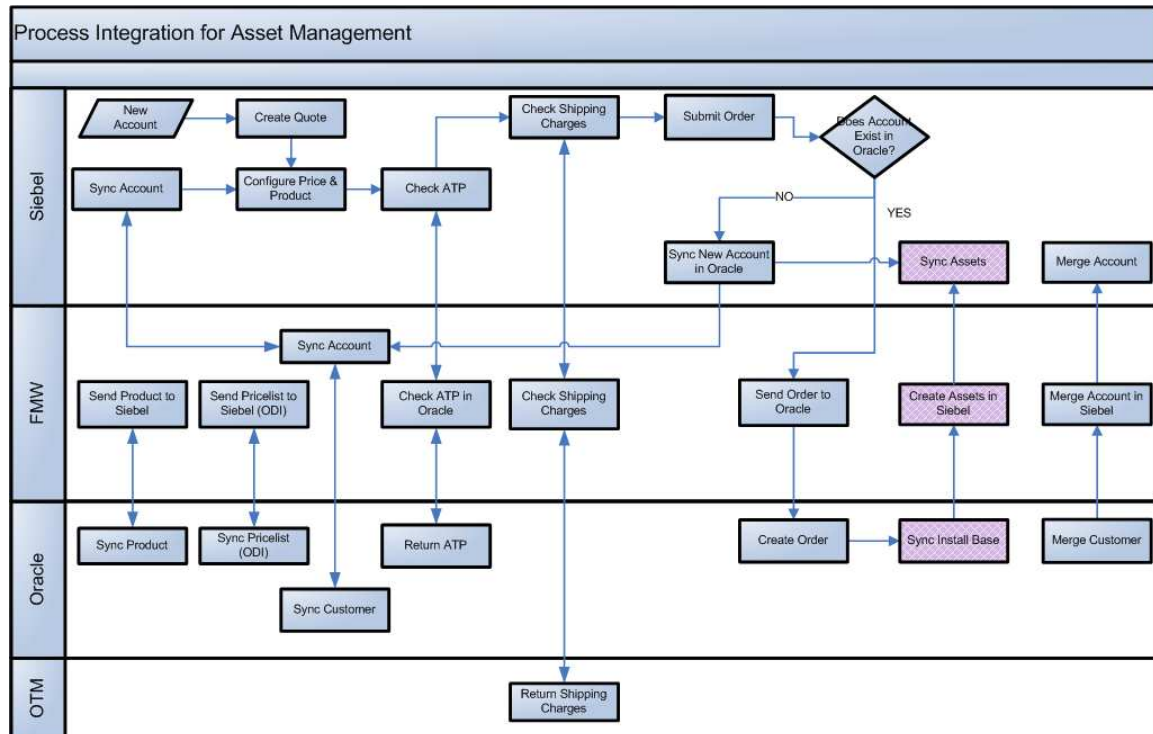
Install base is synchronized to Siebel CRM as an asset.

The process integration for asset management is a one-way synchronization of new or updated customer-owned item instances from Oracle EBS into a Siebel CRM asset. The asset process integration supports the following flows:

- **Create assets** enables the synchronization of new customer-owned item instances from Oracle EBS to Siebel CRM Asset.
- **Update assets** enables the synchronization of updates to Item Instances from Oracle EBS to Siebel CRM Asset.
- **Bulk load of assets** enables the extraction, transformation, and loading of initial Item

instance data from Oracle EBS to Siebel CRM Asset. This feature uses Oracle Data Integrator (ODI) to extract relevant data from Oracle EBS and map it to Siebel interface tables. This process also enables cross-referencing between Oracle EBS and Siebel CRM.

This diagram illustrates where the asset integration flow occurs in the Order to Cash process integration pack (PIP):



Asset Management integration flow in the Order-to-Cash PIP

Oracle Configurator Features

Oracle EBS Configurator is presented to users from the Siebel Order Capture user interface. Configurator leverages Siebel eligibility, compatibility, and pricing.

Interoperability of AIA Process Integration Packs Features

Starting with AIA 2.4 release vehicle, multiple PIPs are bundled in a single AIA release. This gives customers an opportunity to deploy more than one PIP if so desired.

PIPs that are bundled with AIA 2.4 are:

- Order to Cash
- Customer MDM
- Product MDM
- Agile PLM

Each of these PIPs has been designed to support a specific set of source and target applications. Hence, as delivered, the routing rules for each of these PIPs point to specific target applications. However, when a customer deploys more than one PIP, these routing rules may need to be modified so that these PIPs can support interoperability meaningfully to produce the desired functional outcome.

Customers will have to make changes to routing rules if they need to interface the PIPs with additional applications that are not supported by these PIPs as delivered.

Order to Cash 2.4 PIP supports interoperability with Oracle Product Hub PIP, Oracle Customer Hub PIP, and Agile PLM PIPs.

Additional Resources

There are additional resources that can help your organization learn more about this release.

Resource	Navigation
Process Integration Pack Implementation Guides	<p>My Oracle Support: Knowledge > Oracle Applications > Integrations > Application Integration Architecture. Select a Process Integration Pack link.</p> <p>Classic MetaLink: Knowledge > Application Integration Architecture. Select a Process Integration Pack link.</p>
Foundation Pack Guides	<p>My Oracle Support: Knowledge > Oracle Applications > Integrations > Application Integration Architecture > Oracle Application Integration Architecture Foundation Pack</p> <p>Classic MetaLink: Knowledge > Application Integration Architecture > Foundation Pack</p>
Installation and Upgrade Guide	<p>My Oracle Support: Knowledge > Oracle Applications > Integrations > Application Integration Architecture > Oracle Application Integration Architecture Foundation Pack</p> <p>Classic MetaLink: Knowledge > Application Integration Architecture > Foundation Pack</p>

Visit the [My Oracle Support/Oracle Metalink](#) website frequently to keep apprised of ongoing changes.

For other sources of documentation, visit [Oracle Technology Network: Oracle Documentation](#).

For training opportunities, visit [Oracle University](#).