

**Oracle® CRM On Demand Integration Pack for  
JD Edwards EnterpriseOne: Lead to Order 3.1 -  
Release Notes**

Release 3.1

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Oracle CRM On Demand Integration Pack for JD Edwards EnterpriseOne: Lead to Order 3.1 - Release Notes

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# Value Proposition for Oracle CRM On Demand Integration Pack for JD Edwards EnterpriseOne: Lead to Order 3.1

The Oracle CRM On Demand Integration Pack for JD Edwards EnterpriseOne: Lead to Order 3.1 is a pre-built integration that consolidates customer and product information and orchestrates key business processes across an organization's JD Edwards EnterpriseOne Integration Pack and Oracle CRM On Demand deployments.

The Lead to Order: CRM On Demand – JD Edwards EnterpriseOne Integration Pack Process Integration Pack (PIP) allows organizations that use JD Edwards EnterpriseOne Integration Pack to extend CRM functionality to their sales teams, and ensures high levels of data integrity and governance over key business processes across the front and back offices.

Oracle CRM On Demand Integration Pack for JD Edwards EnterpriseOne: Lead to Order 3.1 is focused on the following key areas:

- JD Edwards EnterpriseOne Customer to/from CRM On Demand Account Integration
  - Bulk Data Load (Customer and Contact Information from JDE E1 to CRMOD)
  - Real-Time Synchronization (Customer/Account, bi-directional)
- View/Access JD Edwards EnterpriseOne Customer from CRM On Demand Account
- JD Edwards EnterpriseOne Item to/from CRM On Demand Product Integration
  - Bulk Data Load (from JDE E1 to CRMOD)
  - Real-Time Synchronization (Item/Product)
- Convert CRM On Demand Opportunity to JD Edwards EnterpriseOne Sales Quote/Order Integration

Users can enter or update customer, contact, and product information in the JD Edwards EnterpriseOne system and synchronize that information to the CRM On Demand system. Users can leverage this data within the CRM On Demand system to manage sales leads and opportunities. When the sales cycle progresses to the point where quote orders and sales orders are required, users can initiate both quote and sales order creation from the CRM On Demand system. These orders are then created and maintained within the JD Edwards EnterpriseOne system. From the CRM On Demand system, users can view all of the quote orders and sales orders that are associated with a customer.

Implementing the Lead to Order PIP can help an organization by:

- Enabling users to choose an appropriate On Demand solution for their users, without concern over data silos or standalone CRM implementations reducing the value of the CRM systems in their organization.
- Providing consistent execution of complete lead-to-order processes.
- Providing a single view of the customer, as a single CRM instance would, resulting in a truly

customer-centric organization.

- Lowering the cost and complexity that is associated with implementing a hybrid CRM solution.
- Providing a better upgrade plan than a custom built solution.
- Providing an industry-leading sales force automation solution to JD Edwards EnterpriseOne customers includes capabilities that are not available natively within EnterpriseOne.

These capabilities include imbedded analytical tools, a rich mobility solution, and sales campaign management.

# Product Enhancements for Oracle Lead to Order Integration Pack for Oracle CRM On Demand and JD Edwards EnterpriseOne Integration Pack 3.1

This section discusses new enhancements for the Oracle Lead to Order Integration Pack for Oracle CRM On Demand and JD Edwards EnterpriseOne Integration Pack and lists its key features. These enhancements fall into the following areas:

- Customer data integration
- Product data integration
- Quote/order data integration

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## Customer Data Integration

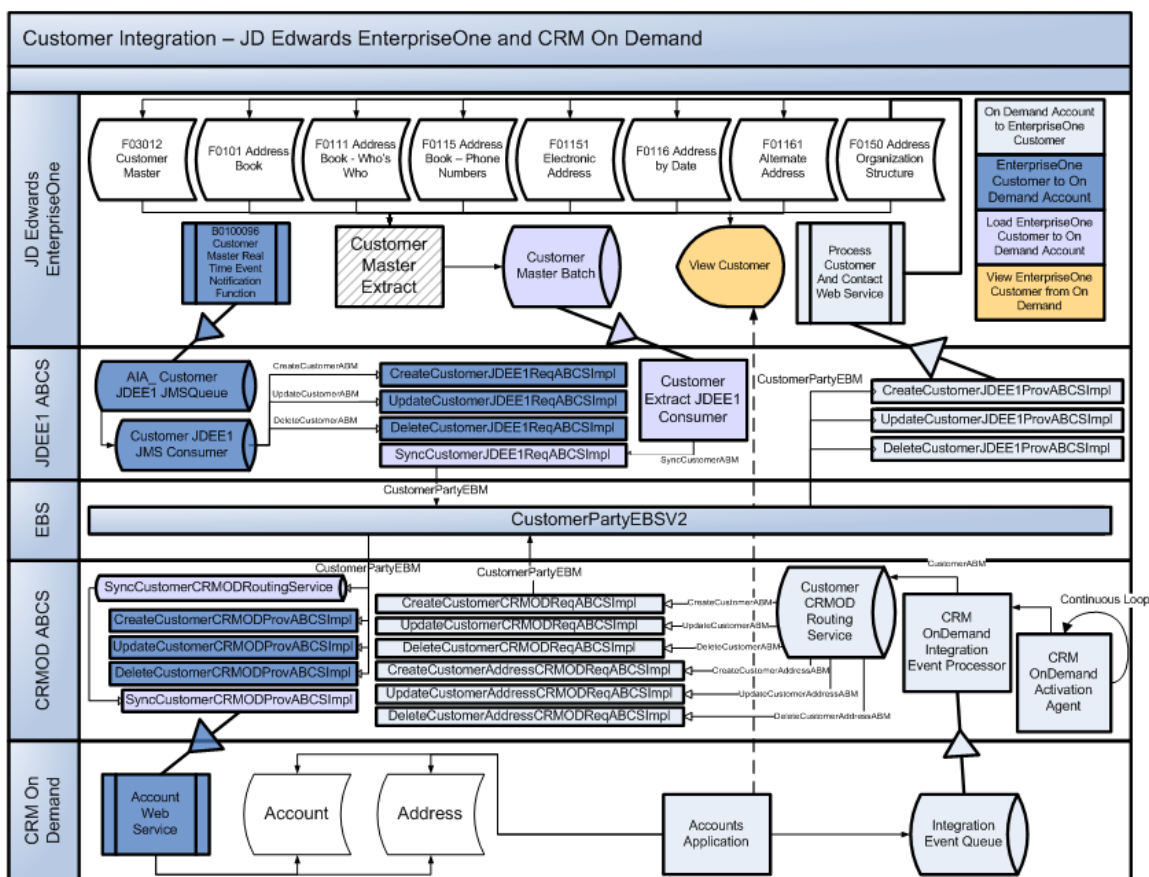
The process integration flow for customer management:

- Supports bi-directional synchronization.
- Sends new customer, customer address, contact and contact address information between CRM On Demand and JD Edwards EnterpriseOne.
- Supports bulk loading of data from JD Edwards EnterpriseOne to CRM On Demand.

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

- Synchronize new customer accounts between CRM On Demand and JD Edwards EnterpriseOne.
- Update, delete, and synchronize existing customer accounts between CRM On Demand and JD Edwards EnterpriseOne.
- Bulk load of customer and contact data from JD Edwards EnterpriseOne to CRM On Demand.

This diagram illustrates the customer management process integration:



### Customer management process integration flow

## JD Edwards EnterpriseOne Customer to/from CRM On Demand Account Integration

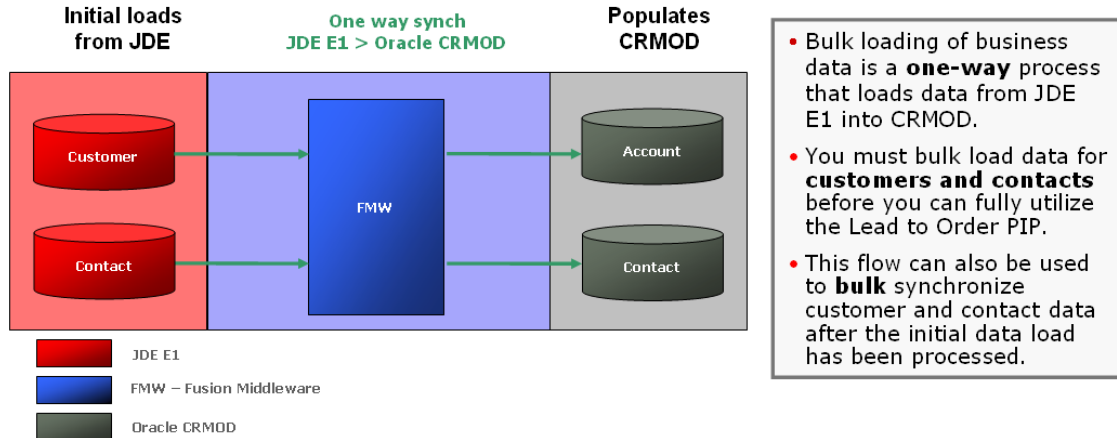
Being able to maintain the same customers in both systems allows the sales personnel to easily leverage the functionality and data associated with these records, while at the same time enabling the easy flow to back office processes in an efficient and streamlined fashion.

There are two aspects to integrating customer and account information between JD Edwards EnterpriseOne and CRM On Demand. Customers in JD Edwards are referred to as Accounts in CRM On Demand. Data can be initially bulk loaded from JD Edwards into the CRM On Demand system. On an on-going basis, customer and account information can be synchronized real-time between the two systems in an easy automated process that is transparent to the user.

### Bulk Data Load (Customer and Contact Information from JDE E1 to CRMOD)

This is a master data flow that enables users to bulk load data about customers, and their associated contact people, from the JD Edwards EnterpriseOne database into the CRM On Demand database. This is a one-directional process flow from JD Edwards EnterpriseOne to CRM On Demand. This flow can also be used to bulk synchronize customer and contact data after the initial data load has been processed.

## Customer and Contact Bulk Data Loads

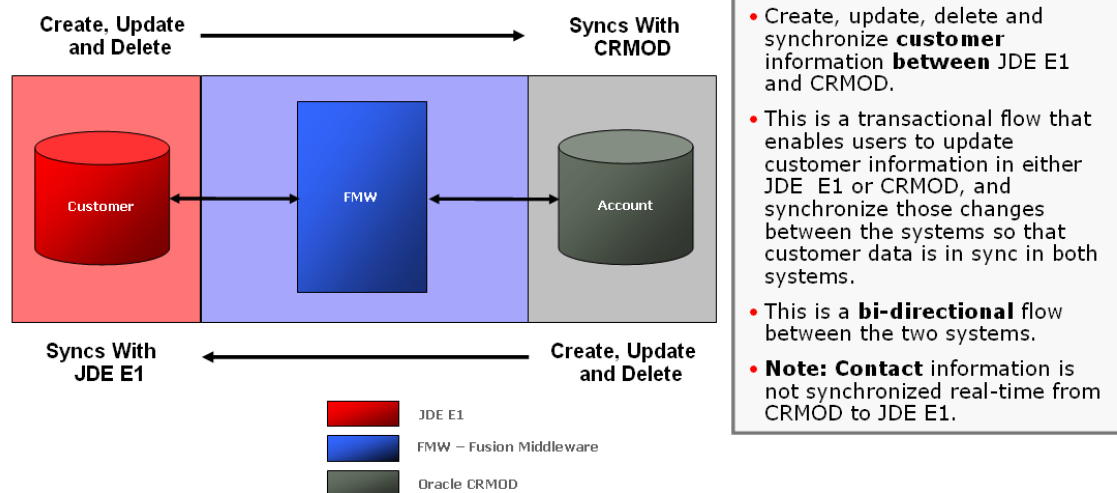


### Customer and contact bulk data loads

#### Real-Time Synchronization (Customer/Account, bi-directional)

This is a transactional flow that enables users to update customer information in either JD Edwards EnterpriseOne or CRM On Demand, and synchronize those changes between the systems so that customer data is in sync in both systems. This is a bidirectional flow between the two systems.

## Customer Real-Time Data Synchronization



### Customer real-time data synchronization



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## View/Access JD Edwards EnterpriseOne Customer from CRM On Demand Account

Once a customer has been synchronized between the two systems, users can click a web link in the CRM On Demand application to easily navigate to the JD Edwards customer application. Once there, the user has access to all of the functionality and features of the JDE E1 CRM Customer Application, enabling a 360 degree view of the customer-related information.

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## Product Data Integration

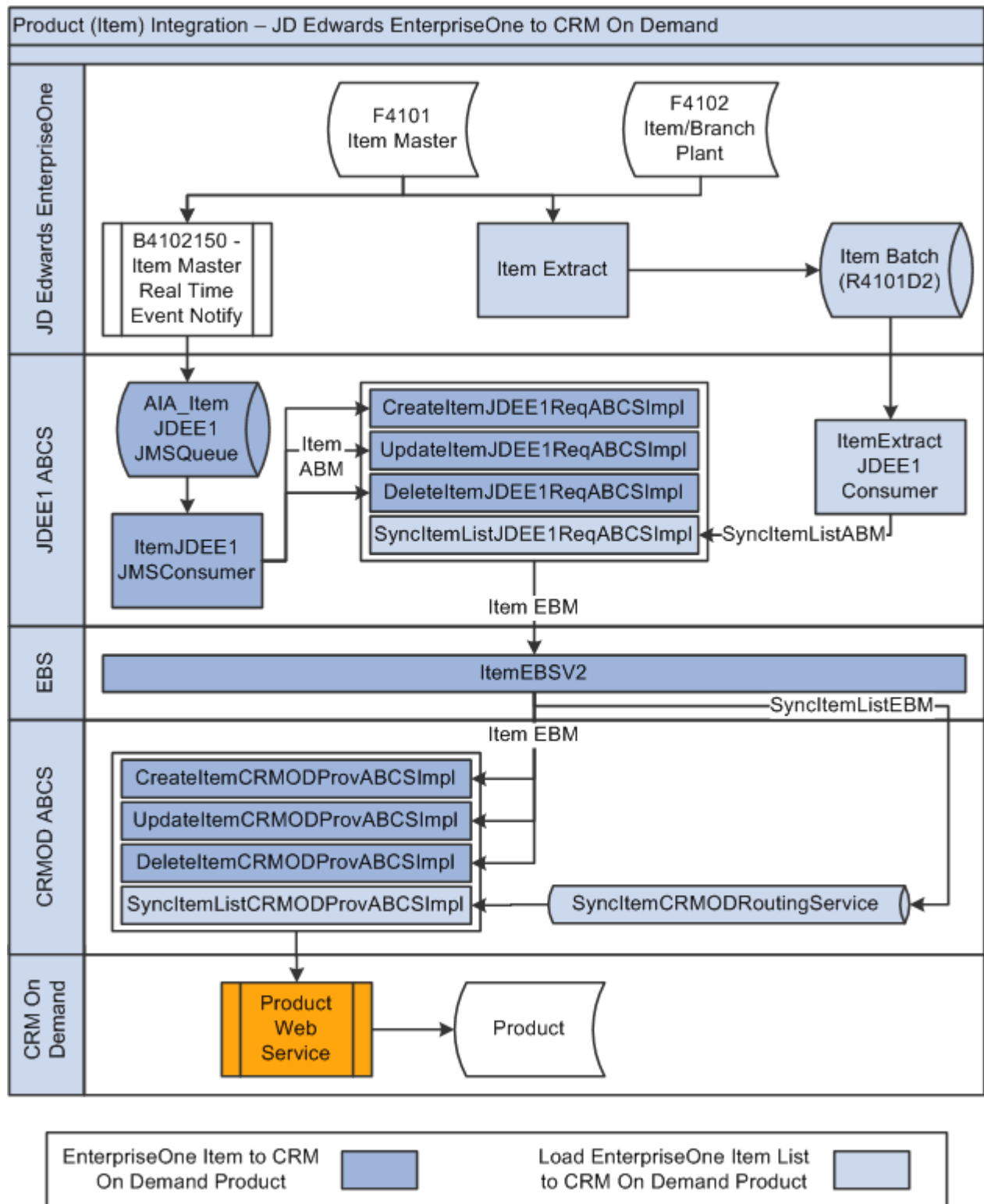
The process integration flow for product management:

- Sends product information between CRM On Demand and JD Edwards EnterpriseOne.
- Supports bulk loading of data from JD Edwards EnterpriseOne to CRM On Demand.

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

- Synchronize new products between CRM On Demand and JD Edwards EnterpriseOne.
- Update, delete, and synchronize existing products between CRM On Demand and JD Edwards EnterpriseOne.
- Bulk load of product data from JD Edwards EnterpriseOne to CRM On Demand.

This diagram illustrates the customer management process integration:



### Product Management Process Integration Flow

## JD Edwards EnterpriseOne Product to/from CRM On Demand Integration

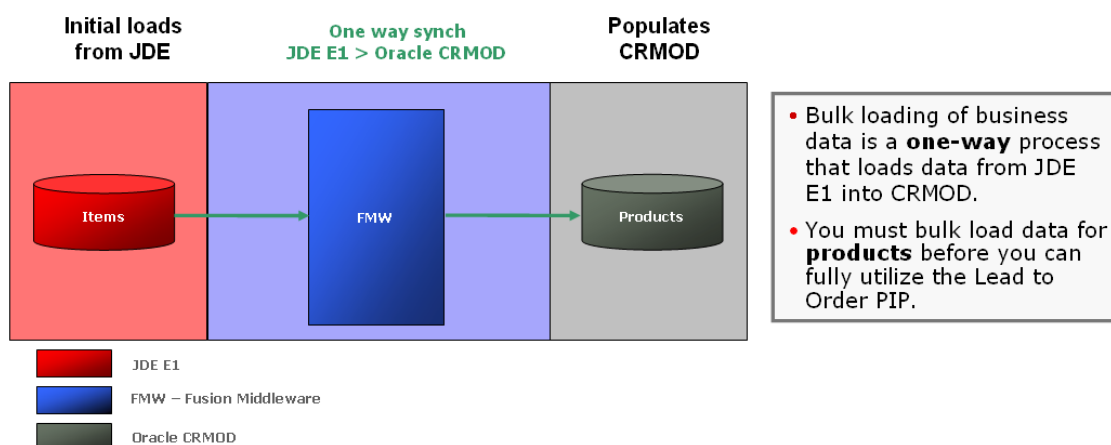
Being able to maintain the same products in both systems allows the sales personnel to easily add products to an opportunity in CRM On Demand and then be able to create a JD Edwards Sales Quote or Order and process the quote/order in JD Edwards EnterpriseOne.

There are two aspects to integrating item and product information between JD Edwards EnterpriseOne and CRM On Demand. Items in JD Edwards are referred to as Products in CRM On Demand. Data can be initially bulk loaded from JD Edwards into the CRM On Demand system. On an on-going basis, item information in JD Edwards can be synchronized to product information in CRM On Demand in an easy automated process that is transparent to the user.

### Bulk Data Load (Item Information from JDE E1 to CRM On Demand)

This is a master data flow that enables users to bulk load data about products from the JD Edwards EnterpriseOne database into the CRM On Demand database. This is a one-directional process flow from JD Edwards EnterpriseOne to CRM On Demand.

### Product Bulk Data Loads

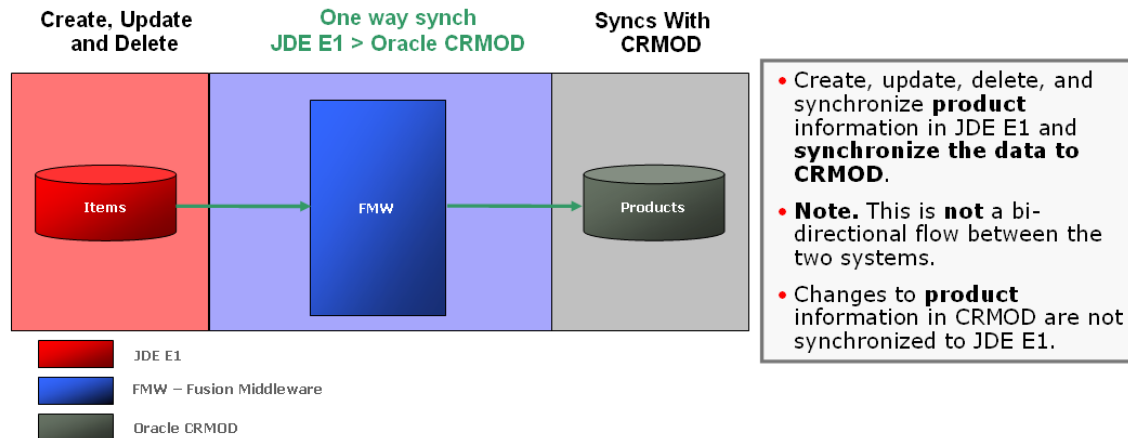


### Product bulk data loads

#### Real-Time Synchronization (Item/Products, one-directional)

This is a transactional flow that enables users to update product information in JD Edwards EnterpriseOne and synchronize those changes to CRM On Demand.

## Product Real-Time Data Synchronization



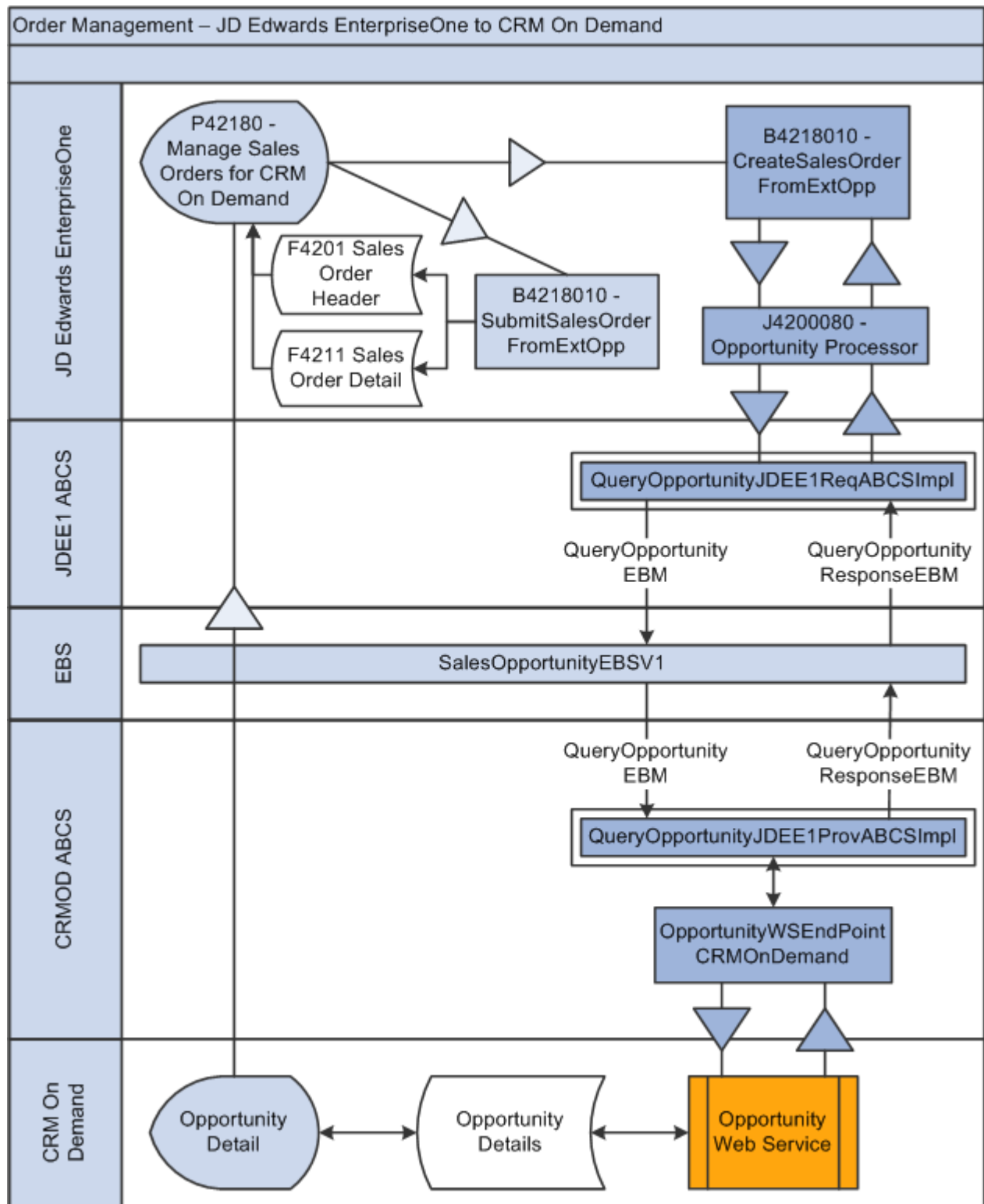
### Product real-time data synchronization

## Quote/Order Data Integration

The process integration flow for quote and order management:

- Sends product and customer information, in the form of a sales opportunity, from CRM On Demand to the JD Edwards EnterpriseOne Sales Order Management system.
- The JD Edwards EnterpriseOne Sales Order Management system processes the sales opportunity and generates a sales quote. The system can also generate additional quotes and sales orders from the initial quote.

This diagram illustrates the quote/order management process integration:



Order management process flow

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## **CRM On Demand Sales Opportunity to JD Edwards EnterpriseOne Sales Quotes and Orders**

This is a transactional flow that enables users to launch the EnterpriseOne quote or sales order generation process from the CRM On Demand system using a custom web link. The web links enable CRM On Demand users to access EnterpriseOne and generate quotes and sales orders, which are generated and maintained in the JD Edwards EnterpriseOne system.

## Additional Resources

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

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

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](#).