

**Oracle® Lead to Order Integration Pack for
Oracle® CRM On Demand and Oracle®
E-Business Suite 3.1 - Release Notes**

Release 3.1

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Value Proposition for Oracle Lead to Order Integration Pack for Oracle CRM On Demand and Oracle E-Business Suite 3.1

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

The Lead to Order: CRM On Demand – Oracle E-Business Suite Process Integration Pack (PIP) allows organizations that use Oracle E-Business Suite 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 Lead to Order Integration Pack for Oracle CRM On Demand and Oracle E-Business Suite 3.1 is focused on the following key areas:

- Integrated opportunity-to-quote or opportunity-to-order management
- Synchronization of customer and product data
- Provision of a single view of customer and product data
- Application Integration Architecture (AIA) Foundation Pack architecture

Integrated Opportunity-to-Quote or Opportunity-to-Order Management

The Lead to Order: CRM On Demand - Oracle E-Business Suite PIP enables orchestration of the lead-to-order business using key capabilities from CRM On Demand such as sales campaign management, mobile sales, sales analytics, and so on, and the Oracle E-Business Suite inventory, pricing, and quote/order processing functionality.

The quote and order processing business flow allow users to directly convert an opportunity in Oracle CRM On Demand to a quote in the Oracle CRM HTML Quoting Module, or to a quote or order within the Oracle Order Management (OM) module.

The key benefits provided by the lead-to-order functionality include:

- The ability to generate sales quotes or sales orders in Oracle E-Business Suite that are based on sales opportunities in the CRM On Demand system, thereby providing the foundation for the development of more complete lead-to-order integrations
- Reduced order errors through the elimination of manual front office to back office transformations
- Reduced implementation costs with preconfigured data mapping and business processes

Synchronization of Customer and Product Data

Integrating data between core applications is a challenge facing many enterprises. The Lead to Order: CRM On Demand – Oracle E-Business Suite PIP allows the integration of customer and product data between Oracle CRM On Demand and Oracle E-Business Suite by providing business processes for performing the initial loading and synchronization of account and product data from Oracle E-Business Suite to Oracle CRM On Demand, and business processes for performing the on-going synchronization of data between the applications.

The Lead to Order: CRM On Demand - Oracle E-Business Suite PIP ensures synchronized customer and product information by providing:

- Batch loading of account and product data from Oracle E-Business Suite to Oracle CRM On Demand
- Bidirectional, near real-time account and contact data synchronization
- One-way, near real-time product data synchronization (Oracle E-Business Suite to Oracle CRM On Demand)

Single View of Customer and Product Data

The Lead to Order: CRM On Demand – Oracle E-Business Suite PIP synchronizes data in near real time, which results in a single, complete customer and product view that is current and consistent across the organization. By providing sales people with customer information that is accurate and timely, sales productivity and effectiveness are improved.

The PIP provides:

- A single, consistent view of customer and product data across the front and back office applications
- In-context access to the Oracle E-Business Suite 360 Degree View from Oracle CRM On Demand
- Visibility from within Oracle CRM On Demand to all of the quotes and sales orders that are associated with accounts or opportunities that have been created through the integration

Application Integration Architecture Framework

The CRM On Demand and Oracle E-Business Suite integration is based on an Oracle Application Integration Architecture framework, which replaces traditional enterprise application integration solutions with flexible, preconfigured, standards-based, business process integration solutions.

The PIP includes the necessary business process models, canonical objects, and Web services required for orchestrating a lead-to-order business process across Oracle CRM On Demand and Oracle E-Business Suite. As an AIA offering, this integration provides an architecture that can be adapted and extended in the future to meet additional data integration requirements that might arise.

Product Enhancements for Oracle Lead to Order Integration Pack for Oracle CRM On Demand and Oracle E-Business Suite 3.1

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

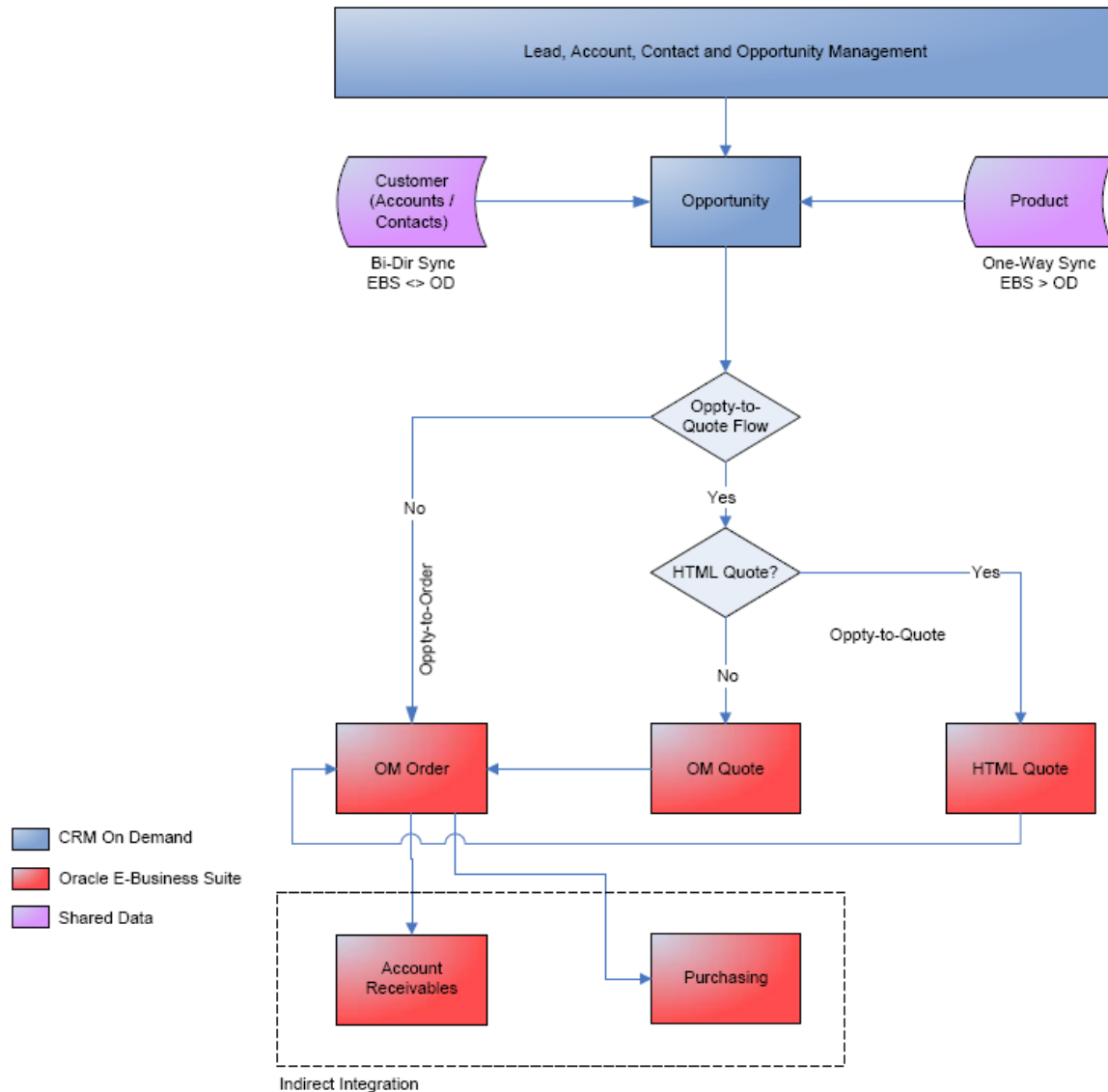
- Lead-to-order business process
- Initial loading and synchronization of data
- Customer data integration
- Product data integration
- User interface integration
- Multi-org support in CRM OnDemand
- AIA 3.1 technology stack foundation

Lead-to-Order Business Process

The Lead-to-Order: CRM On Demand – Oracle E-Business Suite PIP enables the lead-to-order business process by supporting the following functional flows:

- Customer data integration
- Product data integration
- Opportunity to Oracle E-Business Suite HTML Quote
- Opportunity to Oracle E-Business Suite Order Management Sales Order
- Opportunity to Oracle E-Business Suite Order Management Sales Quote
- User interface integration (access to the Oracle E-Business Suite 360 Degree View, and quotes and orders from Oracle CRM On Demand)

The following diagram illustrates the supported process integrations, shows the application that is responsible for each element in the lead-to-order business process, and illustrates the integration points between both applications.



High level process integrations

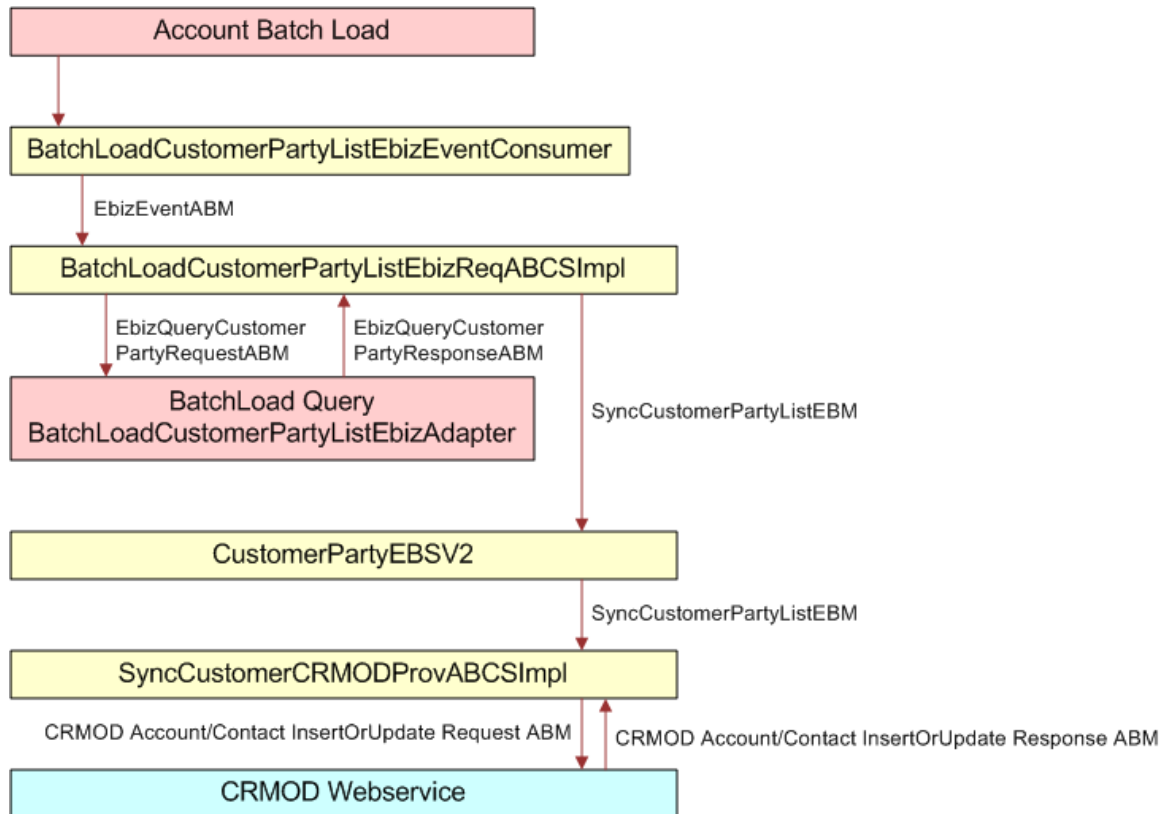
Initial Loading and Synchronization of Data

The lead-to-order integration requires that business data is synchronized between Oracle E-Business Suite and Oracle CRM On Demand. The Batchload process integration is used to perform the extract, transformation, and initial loading of the business data that is to be synchronized. This process also establishes the cross-references between each of the synchronized entities.

The initial batch loading of business data is a one-way process— data is loaded from Oracle E-Business Suite to Oracle CRM On Demand.

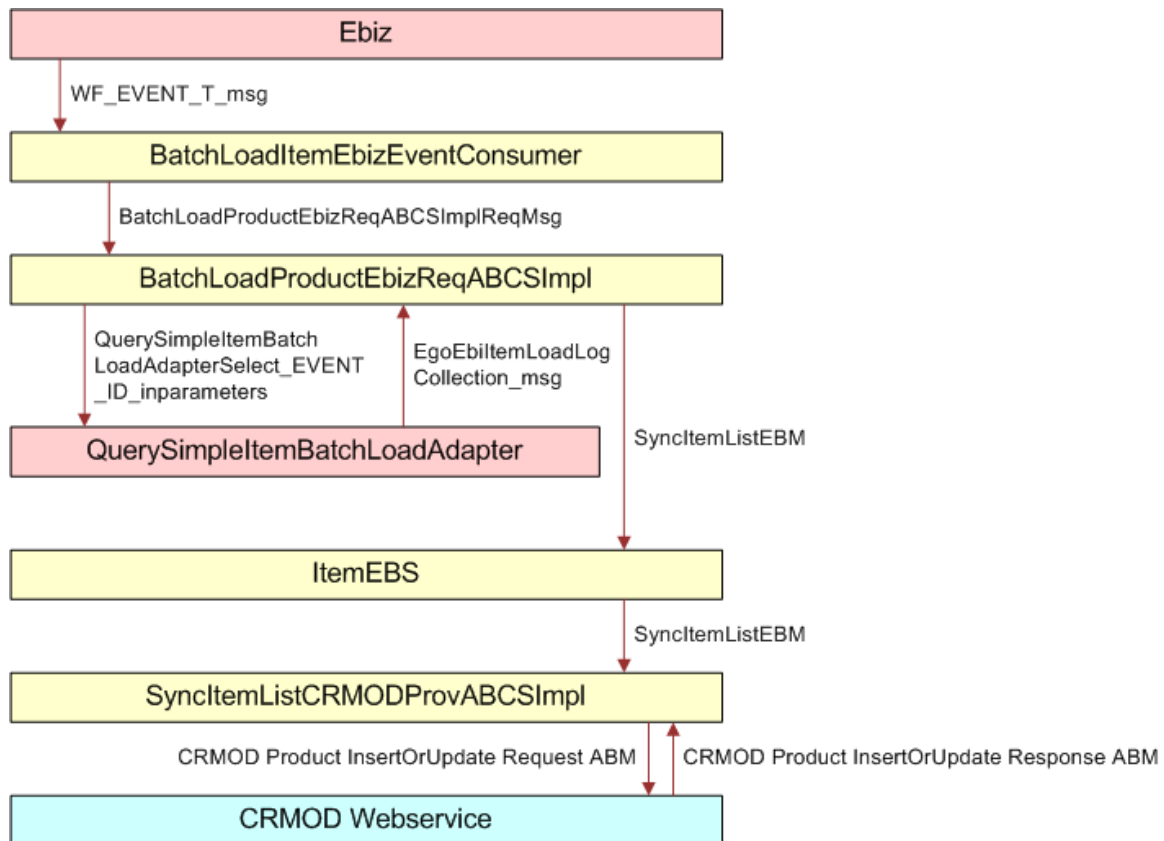
The Batchload Customer Account business process and the Batchload Product business process perform the initial loading of customer data (accounts and contacts) and product data respectively.

This diagram illustrates the process flow for the initial loading and synchronization of account data from Oracle E-Business Suite to Oracle CRM On Demand.



Batchload Customer Account process flow

This diagram illustrates the process flow for the initial loading and synchronization of product data from Oracle E-Business Suite to CRM On Demand.



Batchload Product process flow

Customer Data Integration

The process integration for customer account management between Oracle E-Business Suite and CRM On Demand supports these integration flows:

- Synchronize accounts from Oracle E-Business Suite to CRM On Demand
This flow enables the synchronization of accounts from Oracle E-Business Suite to CRM On Demand. When a customer-account is created or updated in Oracle E-Business Suite, the account details such as addresses, contacts, phone and fax information, and so on are synchronized to CRM On Demand.
- Synchronize accounts from CRM On Demand to Oracle E-Business Suite
This flow enables the synchronization of customer accounts from CRM On Demand to Oracle E-Business Suite. When a new account is created in CRM On Demand that is marked for synchronization, a real-time synchronization flow is initiated to synchronize the CRM On Demand account to the related party and customer-account in Oracle E-Business Suite.
- Update and synchronize accounts from CRM On Demand to Oracle E-Business Suite
This flow enables the synchronization of account updates from CRM On Demand to Oracle E-Business Suite for account records that have been flagged for synchronization within CRM On Demand.

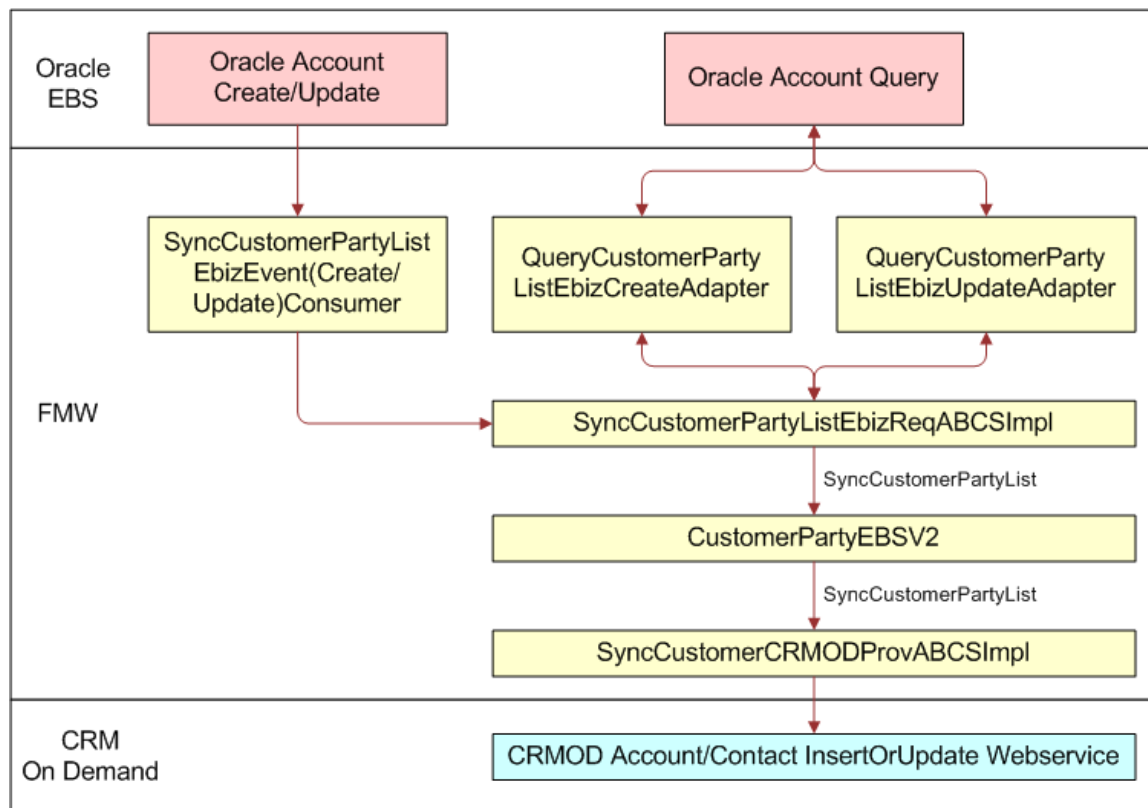
- Merge accounts

This flow is initiated in Oracle E-Business Suite when a customer-account is merged into another customer-account. The corresponding merge operation is then performed in CRM On Demand on the related accounts. Upon merge completion, the child records of the losing account record point to the winning account record.

- Merge parties

This flow is initiated in Oracle E-Business Suite when an organization party is merged into another party. All of the child records that belong to the surviving party are synchronized to CRM On Demand after the merge.

This diagram illustrates the Customer Account integration process.

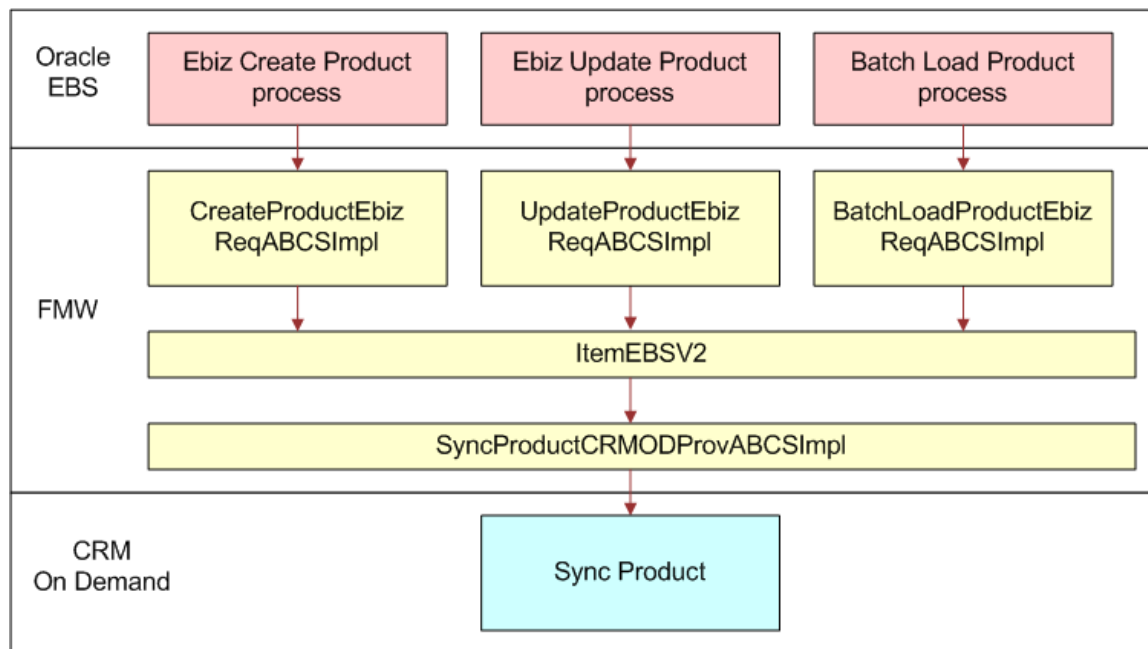


Customer Account integration flow

Product Data Integration

The process integration for product management supports the Synchronize Items Integration flow which enables the synchronization of simple products from Oracle E-Business Suite to CRM On Demand. This one-way flow of data from Oracle E-Business Suite to CRM On Demand is initiated when simple products are created or updated in Oracle E-Business Suite.

This diagram illustrates the Product Management integration process.



Product Management integration flow

User Interface Integration

The lead-to-order business process allows users to generate either a quote or a sales order in Oracle E-Business Suite directly from a CRM On Demand sales opportunity. The quote or order is created using the account and product-revenue information that is stored in the CRM On Demand opportunity record. The relevant quote or order details are stored and maintained in Oracle E-Business Suite.

Details of quotes and orders associated with an account or opportunity can be viewed from within CRM On Demand through a Web link that navigates to the related Oracle E-Business Suite page.

Users can also access a 360 degree view of an account from within CRM On Demand using a Web link that the administrator defines on the Account Details page. The Web link launches the Oracle E-Business Suite Customer Online Transaction View page, which displays a number of Oracle E-Business Suite back-office transactions for an account, for example, invoices, orders, quotes, service requests, and so on.

Multi-Org Support in CRM On Demand

The multi-org feature is supported in CRM On Demand at the account level only.

For more information, see *Oracle Lead to Order Integration Pack for Oracle CRM On Demand and Oracle E-Business Suite 3.1 Implementation Guide*, "Appendix C: Settings for Multi-Org Implementation," Multi-Org Usage at Account Level in CRM On Demand.

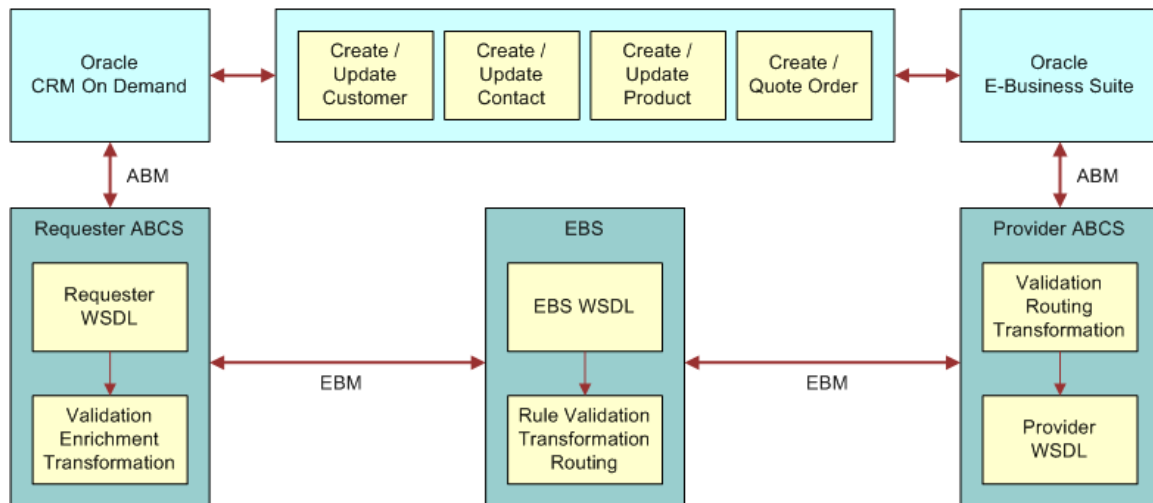
Application Integration Architecture Technology Stack Foundation

This release of the Lead to Order: CRM On Demand – Oracle E-Business Suite PIP uses the Application Integration Architecture (AIA) 3.1 Foundation Pack methodology and architecture, providing a standards-based, extensible, lead-to-order business process.

The following integration points are supported:

- Create Account
- Update Account
- Create Account-Contact
- Update Account-Contact
- Create Account-Address
- Update Account-Address
- Merge Account
- Merge Party
- Create Simple Product
- Update Simple Product
- Create Order
- Create Quote
- Load Customers (initial)
- Load Products (initial)

This diagram represents the key AIA components of the Lead-to-Order: CRM On Demand – Oracle E-Business Suite PIP.



AIA 3.1 architecture components

The following Enterprise Business Objects, Enterprise Business Messages, and Enterprise Business Services are used in the PIP.

Enterprise Business Objects

- SalesOrderEBO
- SalesQuoteEBO
- CustomerPartyEBO
- ItemEBO

Enterprise Business Messages

- CreateCustomerPartyEBM
- CreateCustomerPartyResponseEBM
- UpdateCustomerPartyEBM
- UpdateCustomerPartyResponseEBM
- QueryCustomerPartyListEBM
- SyncCustomerPartyListEBM
- ProcessCustomerPartyListEBM
- SyncItemListEBM
- CreateSalesOrderEBM
- CreateSalesOrderResponseEBM
- ProcessSalesOrderEBM
- ProcessSalesOrderResponseEBM

- CreateSalesQuoteEBM
- CreateSalesQuoteResponseEBM
- ProcessSalesQuoteEBM
- ProcessSalesQuoteResponseEBM

Enterprise Business Services

- CustomerPartyEBSV2
- CustomerPartyResponseEBSV2
- ItemEBSV2
- CustomerPartyOrchestrationEBSV2
- SalesQuoteEBS
- SalesQuoteResponseEBS
- SalesQuoteOrchestrationEBS
- SalesQuoteOrchestrationResponseEBS
- SalesOrderEBSV2
- SalesOrderResponseEBSV2
- SalesOrderOrchestrationEBSV2
- SalesOrderOrchestrationResponseEBSV2

Key Features

This section outlines the key features provided by this version of the Lead-to-Order: CRM On Demand - Oracle E-Business Suite PIP. The new features can be categorized as data enhancement features, process enhancement features, and user interface enhancement features.

Data Enhancement Features

- Enhanced initial data load facilities for customer and product data
- Enhanced customer data integration:
 - A CRM On Demand customer account is mapped to an Oracle E-Business Suite customer-account
 - A CRM On Demand account-contact is mapped to an Oracle E-Business Suite account-contact
- Ability to designate specific CRM On Demand customer account and contact information to be integrated to Oracle E-Business Suite

Process Enhancement Features

- Lead-to-order business process support:
 - CRM On Demand Opportunity to Oracle E-Business Suite HTML Quoting integration
 - CRM On Demand Opportunity to Oracle E-Business Suite Order integration
 - CRM On Demand Opportunity to Oracle E-Business Suite Order Management Quoting integration
- Use of Oracle CRM On Demand workflow integration events and integration event queues to facilitate integration to Oracle E-Business Suite
- Support for account and party merge operations initiated from Oracle E-Business Suite
- Enhanced integration administration and monitoring:
 - Proxy server, and proxy server credentials, can be specified for the integration
 - Synchronization failure alerts and synchronization failure lists can be configured in Oracle CRM On Demand, allowing administrators to take corrective action
 - Enhanced error handling for business and system errors
- Based on the AIA 3.1 Foundation Pack technology stack with support for Enterprise Business Objects, cross-reference tables, Enterprise Business Services, and Enterprise Business Messages
- Uses BPEL processes and CRM On Demand Web services for the initial loading of data from Oracle E-Business Suite to CRM On Demand

User Interface Features

- Transparent integration to Oracle E-Business Suite using the Oracle CRM On Demand native user interface for account and contact create operations and lead conversion operations
- Use of native CRM On Demand Quote and Order objects to facilitate the opportunity-to-quote and opportunity-to-order conversion process
- Support for mobile and offline CRM On Demand clients
- Support for Oracle E-Business Suite 11.5.10.2 and R12.1.1

Participating Application Enhancements

To enable the lead-to-order integration solution, Oracle has enhanced the CRM On Demand application for Lead-to-Order: CRM On Demand - Oracle E-Business Suite PIP customers by providing native CRM On Demand Quote and Order objects.

Additional Resources

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

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

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

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