

**Siebel CRM Integration Pack for Oracle® Order  
Management: Order to Cash 3.1 -  
Release Notes**

Release 3.1

**Part No. E20590-01**

February 2011

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# Siebel CRM Integration Pack for Oracle Order Management: Order to Cash 3.1

This document provides an overview of the value proposition for the Siebel CRM Integration Pack for Oracle Order Management: Order to Cash PIP 3.1. It is a roadmap intended to help customers assess business benefits of the Siebel CRM Integration Pack for Oracle Order Management 3.1 and plan 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.

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## Overview

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) 3.1 has been built on the Oracle Application Integration Architecture (Oracle 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
  - Oracle AIA replaces traditional enterprise application Reduced order errors through elimination of manual front to back office transformation
  - Faster order processing with call-outs to eBS ATP Check, Shipping, Payments, Credit Check

Oracle Application Integration Architecture 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 that customers require out-of-the-box. Now implementations can quickly orchestrate a sustainable order to cash business process across Siebel CRM and Oracle E-Business Suite with reduced cost and risk. In addition, the Oracle AIA adaptable framework enables customers to extend the integration to accommodate specific business needs.

# Product Enhancements for Siebel CRM Integration Pack for Oracle Order Management

No integration process enhancements were done for the Siebel CRM Integration Pack for Oracle Order Management 3.1 release.

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## Certified Versions for the Participating Applications

The following are the versions that are certified for use with this release:

- Siebel CRM releases 8.0.0.10 and 8.1.1.3
- Oracle E-Business Suite releases 11.5.10CU2 and 12.1.2
- Oracle Transportation Management 5.5 CU5 (only for Shipping Charges integration flow)

**For more information** about participating applications enhancements, see the Release Notes for the respective application.

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## Foundation Pack

The Siebel CRM Integration Pack for Oracle Order Management: Order to Cash 3.1 is supported by Foundation Pack 11gR1 (11.1.1.4.0) and available on Oracle Fusion Middleware/SOA Suite 11g.

**For more information**, see Oracle Application Integration Architecture Foundation Pack 11g Release 1 (11.1.1.4.0) Release Notes.







The Order to Cash business process enables deployments to create and update an order across the life cycle of the entire order. This business process supports complex pricing and product configuration, availability checking, credit verification, shipping and tax calculations, and multiple methods of payment to ensure that before any orders delivered to the customer are complete and accurate.

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 Siebel CRM and Oracle ERP. It also leverages a customer's existing investment in Oracle Configurator.

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
- Quote Process Integration
- Order Process Integration
- Service calls: Available to Promise, Credit Check, Payment Authorization, and Shipping Charges
- Asset Management

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

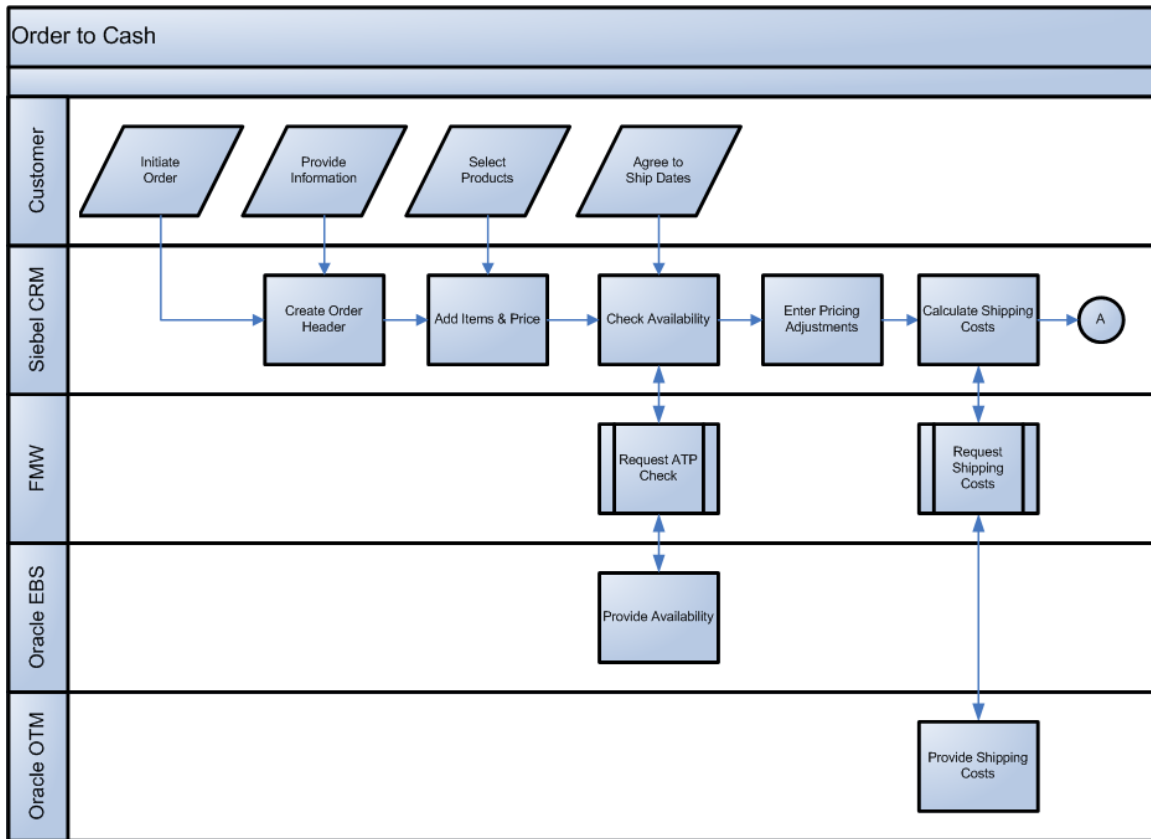
- Create Customer
- Update Customer
- Merge Customer
- Create Simple Product
- Update Simple Product
- Create Product Hierarchy
- Configure Product
- Create Order

- Revise Order (Add, Change, Cancel Order lines)
- Cancel Order
- Update Order Status
- Create Price List
- Update Price List
- Create Asset
- Update Asset
- ATP Check
- Credit Check
- Payment Authorization
- Calculate Shipping Charge
- Schedule Dates Synchronization
- Freight Charges Synchronization
- Taxes Synchronization
- Load Customers (initial)
- Load Products (initial)
- Load Assets (initial)
- Load Pricelists (initial)

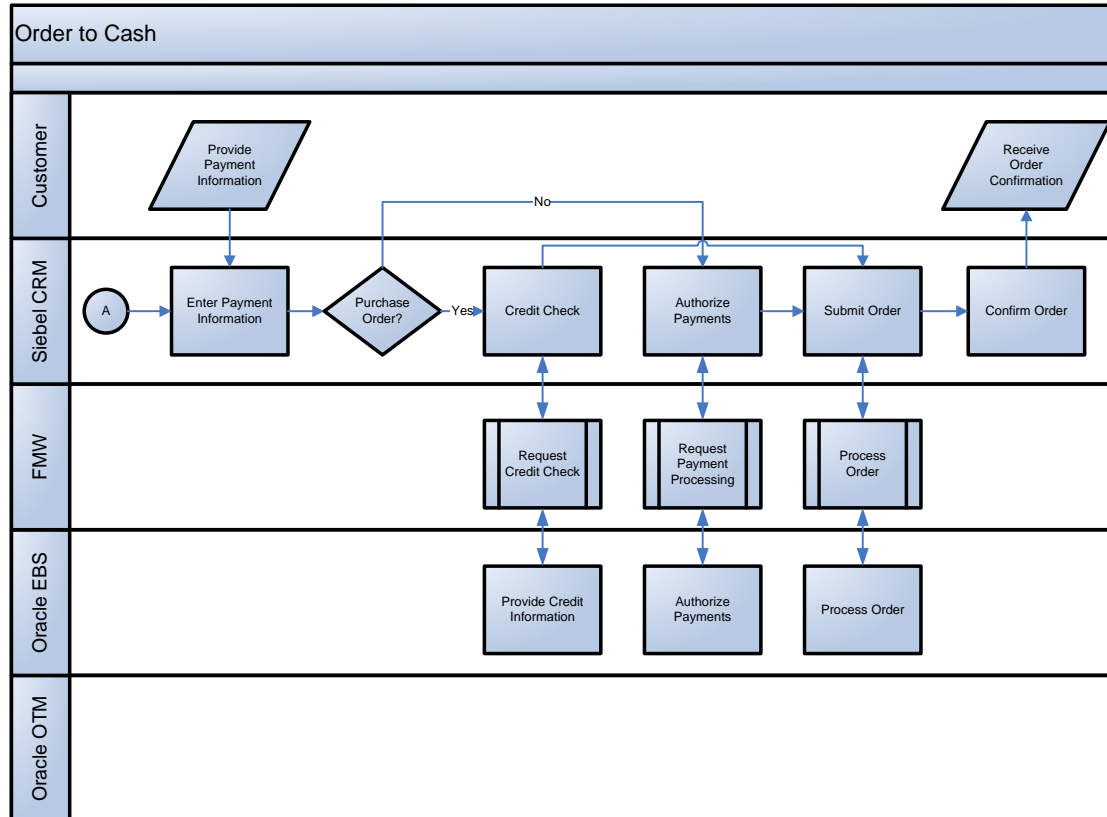
The Siebel CRM Integration to Oracle Order Management uses the following Enterprise Business Objects:

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

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

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.

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## Process Integration for Product Management

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.

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## Process Integration for Price Lists

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.

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## Process Integration for Quotes

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.

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## Available to Promise Check Integration Flow

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.

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## Shipping Charges Integration Flow

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 Transportation Management (OTM). The source address, destination address, and weight information is passed to 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 (CSR) 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.

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.

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## Credit Check Integration Flow

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.

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## Payment Authorization Integration Flow

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, which 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.

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## Process Integration for Order Management

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 order:** This flow enables the processing of new orders submitted from Siebel CRM to Oracle EBS.
- **Revise sales order** (Siebel CRM initiated): This flow enables the processing of order revisions or changes from Siebel CRM to Oracle EBS.
- **Cancel sales orders:** This flow enables the processing of order cancellations from Siebel CRM to Oracle EBS.
- **Update sales orders** (Oracle EBS initiated) enables the synchronization of order updates from Oracle EBS to Siebel CRM.

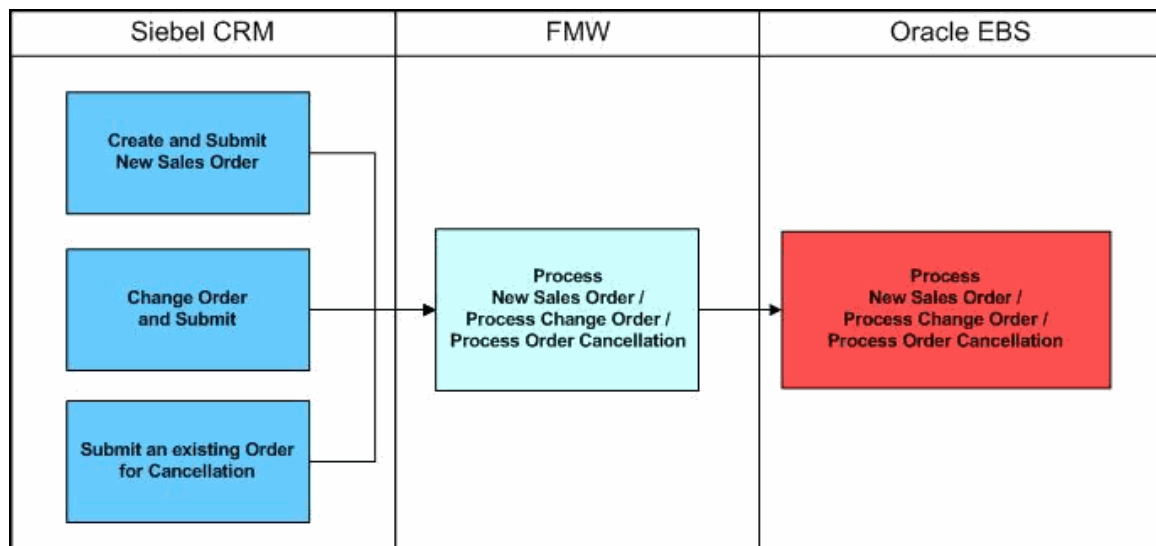
In this flow, shipping details from Oracle EBS are also synchronized.

Additionally, freight charges, and estimated taxes are synchronized 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

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## Process Integration for Asset Management

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.

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## Oracle Configurator

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

## Bug Fixes

Please see the latest *Known Issues and Workarounds (KIWA) document* for Siebel CRM Integration Pack for Oracle Order Management 3.1 on My Oracle Support website.



## Additional Resources

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

Resource	Navigation
Process Integration Pack Implementation Guides	Oracle Technology Network: <a href="http://www.oracle.com/technetwork/index.html">http://www.oracle.com/technetwork/index.html</a>
Foundation Pack Guides	Oracle Technology Network: <a href="http://www.oracle.com/technetwork/index.html">http://www.oracle.com/technetwork/index.html</a>
Installation and Upgrade Guide	Oracle Technology Network: <a href="http://www.oracle.com/technetwork/index.html">http://www.oracle.com/technetwork/index.html</a>

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