Siebel CRM Integration Pack for Trade Promotion Management Implementation Guide

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Siebel CRM Integration Pack for Trade Promotion Management

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1 Introduction to Siebel CRM Integration Pack for Trade Promotion Management

Preface

Welcome to the Siebel CRM Integration Pack for Trade Promotion Management Implementation Guide.

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.

Accessibility of Links to External Web Sites in Documentation

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Structure

1 Introduction to Siebel CRM Integration Pack for Trade Promotion Management

2 Siebel CRM Integration Pack for Trade Promotion Management Environment

3 Installation and Configuration

4 Integrations

Related Documents

For more information, read the following documents:

- *Oracle Trade Management Implementation Guide*
- *Oracle Trade Management User Guide*
- *Siebel Consumer Goods Guide*

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 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 may change a row in one table without making corresponding changes in related tables. If your tables get 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 may 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, install base, 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).

BES. Oracle Business Event System based on Oracle Workflow

BOM. Bill of materials - defines 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 may be used as a means to develop custom lists of items on which to report and sort. A category set is a distinct grouping scheme and consists of categories.

CBM. The “created_by_module” column in TCA tables

CDH. Oracle Customer Data Hub

Chargeback. Amount of a deduction that is rejected by the manufacturer and charged back to the wholesaler/retailer.

Connector. Siebel product that supports point-to-point integration

Consumer Products Goods or CPG Manufacturer. Consumer Products manufacturers typically sell one of the following types of consumer products: Durable Goods, Packaged Goods, Food and Beverage, Health and Beauty and Configured Products. One key characteristic of Consumer Products Manufacturers is that they sell "consumer" products but typically always use a retailer, distributor or wholesaler to distribute their product instead of selling directly to the consumer. Consumer Products Manufacturers have a unique requirement because they offer their customers trade dollars to market and sell their products.

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 that may or may not be related to an Account (Organization customer) or another Contact (individual customer).

Consumer Products Industry. The Consumer Products industry is divided into two segments: Durables and Non-Durables. Durable goods are items that the purchaser assumes will be used for long periods of time. Examples are washer/dryers, refrigerators, exercise equipment, bicycles, and clothing. Non-Durable goods include 3 sub segments. 1.) Shelf stable consumables (such as cereal, shampoo, and cleaners) 2.) Perishable food (such as fresh baked goods and refrigerated food) 3.) Beverages.

Corporate Promotion. A trade promotion designed to drive sales across numerous accounts and generated by a manufacturer at a national, divisional or corporate level.

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 case of a Business-to-Consumer relationship or a company (organization) in 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 is the equivalent of an organization party plus account in Oracle, and a Contact is the equivalent of a person party plus account in Oracle.

Deal. A record that consists of the funding source, estimated costs, and parameters for the trade offer presented.

Deduction. When an account does not pay the full amount of a manufacturer's invoice for the settlement of a trade related expense.

EAI. Enterprise Application Integration

EBS. Oracle E-Business Suite Applications

FMW. Oracle Fusion Middleware

Fund Group. A Siebel Trade promotions concept for facilitating the creation of multiple trade funds.

Fund Transfers. Moving the assignment of a trade fund from one account to another.

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

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

Live Budget. A live budget is a fully accrued budget that starts at zero and increases based on order activity. In some systems this is referred to as a Rolling Fund. The initial budget is calculated based on a past shipment period and as shipments are made, the fund accrues additional budget amounts.

Merchandising Activity. The details of one aspect of a trade promotion. A trade promotion can have 1 or more merchandising activities/types. For example, a Summer Promotion can be comprised of 3 Merchandising Activities/Types: Temporary Price Reduction of $100 off/case given directly off of the invoice, Temporary Price Reduction of $250 off/case given in the form of a rebate and a $2000 Lump sum payment for putting up an end aisle display promoting my products.

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

OAF. Oracle Applications Framework for Development

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 TCA table

OWB. Oracle Warehouse Builder

Party. In Oracle E-Business Suite 11i, more specifically in the Trading Community Architecture (TCA), a party is defined as any individual or organization with whom the implementing organization can do business. A party in Oracle TCA can be a customer, in case a selling relationship has been established or for example a vendor or an employee. The same party can have multiple such roles within Oracle E-Business Suite 11i. This integration solution addresses those parties in Oracle E-Business Suite 11i that represent customer data.

Period. Duration of time for the promotion. By default, the Start and End dates for the promotion, shipment, and consumption fields are equal to the start and end dates of the period.

Plan. A group of trade promotions

Pre-authorized deduction. Manufacturer provides retailer prior approval to take a deduction to settle a trade payment claim.

SOD. Siebel CRM On Demand Application

Tactics. Select tactics to use for the promotion. For example, select a feature display or temporary price reduction as a tactic to promote the selected promoted category.

TCA. Trading Community Architecture

Trade Fund. An amount of money appropriated for the execution of trade promotions. Can be fixed or accrual.

Trade Promotion. A term used in the Consumer Product industry to refer to a merchandising event done for, or given to, a retailer in exchange for selling or better positioning the manufacturer's products. Can be a discount given either off-invoice or in the form of a bill back based on incoming sales orders or can be a lump sum payment unrelated to sales orders. Can be made up of one or more merchandising activities/types. The promotion stores high-level information like customer, dates, and description. Trade promotions are always funded out of funds specifically targeted for trade promotions.

UAN. Universal Application Network, a Siebel integration product that support hub-spoke environment

Write Off. Amount of a deduction that cannot be identified and therefore is absorbed by the manufacturer

WS. Web Service

2 Siebel CRM Integration Pack for Trade Promotion Management Environment

This chapter contains the following information:

- About Siebel CRM Integration Pack for Trade Promotion Management on page 13
- Software Requirements on page 13
- Cross-References on page 14

About Siebel CRM Integration Pack for Trade Promotion Management

The Siebel CRM Integration Pack for Trade Promotion Management integrates information between Siebel Trade Promotion Management and Oracle Trade Management. This integration provides the following functionality:

- Synchronizing Foundation objects with modules such as Customers and Products
- Synchronizing Siebel Trade Deal with Oracle Trade Management Offer
- Synchronizing Siebel Flexible Budgets from Trade Promotions to Oracle Trade Management Budgets and Offers
- Synchronizing Siebel Live Funds with Oracle Trade Management Budgets
- Synchronizing Oracle E-Business Suite Deductions with Siebel Trade Promotion Management Deductions for notification that a deduction needs resolution
- Enabling Siebel Trade Promotion Management Deduction Disposition back to Oracle E-Business Suite Deductions

Software Requirements

The software requirements for Siebel CRM Integration Pack for Trade Promotion Management are as follows:

- 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)

Cross-References

To support ongoing customer integration between Oracle Trade Management and Siebel Trade Promotion Management, a cross reference of the unique identifiers of customer data is maintained in the middle tier of the integration. The entities that are cross referenced on the Siebel side are account, address, and contact, which correspond to organization, party site, and organization contact in Oracle Trade Management and Oracle E-Business Suite.

For newly created customer and product records in Oracle Trade Management that need to be synchronized with Siebel Trade Promotion Management, Oracle Trade Management publishes Oracle unique identifiers that can be mapped to the External ID attribute of the appropriate entity in Siebel Trade Promotion Management to establish the cross-references within Siebel Trade Promotion Management.

For updated customer and product records that need to be synchronized with Siebel Trade Promotion Management, Oracle publishes the Oracle unique identifiers. The Siebel Trade Promotion Management Web Service interfaces are able to uniquely identify the records in Siebel Trade Promotion Management that need to be updated.

Similarly, on the Siebel side, newly created or updated fund, deduction, and promotion records in Siebel Trade Promotion Management are correctly reflected in corresponding records in Oracle Trade Management.

Language Support

The Siebel CRM Integration Pack for Trade Promotion Management supports only the English-American language for databases. This language uses the WE8MSWIN1252 character set.

3 Installation and Configuration

This chapter contains the following information:

- Downloading and Installing Siebel CRM Integration Pack for Trade Promotion Management Software on page 15
- Configuring the Oracle E-Business Suite Environment on page 21
- Configuring the Siebel Trade Promotion Management Environment on page 33
- Setting Up Common Integration Server (Including DVMs and Common Services) on page 130
- Process of Deploying BPEL Processes Using Oracle JDeveloper on page 148
- Synchronizing Records after the Oracle Server Has Gone Down on page 152

Downloading and Installing Siebel CRM Integration Pack for Trade Promotion Management Software

Read the following topics to learn how to download and install the software and patches needed for Siebel CRM Integration Pack for Trade Promotion Management.

- Downloading Required Software on page 15
- Installing Oracle E-Business Suite Patches on page 16
- Installing Fusion Middleware Software on page 17
- Installing Oracle Fusion Middleware and Oracle JDeveloper Patches on page 18

Downloading Required Software

The required software for Siebel CRM Integration Pack for Trade Promotion Management is available on Oracle E-Delivery.

To download the files

1. Log in to Oracle E-Delivery (http://edelivery.oracle.com).
2. From the Product Pack menu, choose Oracle Application Integration Architecture.
3. From the Platform menu, choose your platform, and click Go.
4. Download the following files:

- Siebel CRM Integration Pack for Trade Promotion Management Implementation Guide, v1.0 (Documentation_TPMIPv1.0.zip)
- Oracle Database 10g Release 2 (10.2.0.1) (file name(s) and count vary by platform)
- Oracle Database 10g Release 2 Patches (DB_Patches_AIAv1.0.zip)
- Oracle SOA Suite 10g (10.1.3.1.0) (file name(s) and count vary by platform)
- Oracle Fusion Middleware 10.1.3.1 Patches (FMW_Patches_AIAv1.0.zip)
- Siebel CRM Integration Pack for Trade Promotion Management, v1.0, E-Business Suite Patch (EBS_Patches_AIAv1.0.TPM.zip), which contains the following files:
  - E-Business Suite Generic Patch (EBS_Patches_AIAv1.0.TPM_generic.zip)
  - E-Business Suite Operating System Patch (as needed)

Operating System	Patch File Name
AIX Based Systems (32-bit)	EBS_Patches_AIAv1.0.TPM_aix.zip
HP Tru64 UNIX	EBS_Patches_AIAv1.0.TPM_tru64.zip
HP-UX PA-RISC (32-bit)	EBS_Patches_AIAv1.0.TPM_hpux11.zip
Linux x86	EBS_Patches_AIAv1.0.TPM_linux.zip
Microsoft Windows (32-bit)	EBS_Patches_AIAv1.0.TPM_winnt.zip
Solaris Operating System (SPARC 32-bit	EBS_Patches_AIAv1.0.TPM_solaris.zip

- Siebel CRM Integration Pack for Trade Promotion Management, v1.0, Siebel CRM Patches
- Siebel CRM Integration Pack for Trade Promotion Management, v1.0 (SEBLTPMIntegPkEBSTMv1.0.zip)

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.

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

To install Oracle E-Business Suite Patches

1. Download the Oracle E-Business Suite patch. The file name is: EBS_Patches_AIAv1.0.TPM.zip.
2. Use a zip utility to extract the Oracle E-Business Suite generic patches and applicable operating system patch from the patch file.

   Extracting from the patch file yields a set of patch zip files.
3. Apply each of these patches to your Oracle E-Business Suite application.

4 Install the patches listed in Table 1, in the specific order of installation.

Table 1. Patches Needed for Oracle E-Business Suite

Order	Patch Number	Comments
1	3618299	TCA Patchset HZ.n
2	4280097	Customer - HZ.N fixes party merge
3	5046954	Customer - TCA Backported Integration Service Patch
4	5221609	Customer – Integration patch
5	6021150	Simple Products
6	6021155	Simple Products - Integration patch. Backports business event changes.
7	5929632	OZF - Trade Management

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.
Click Oracle Application Server 10g Release 3 (10.1.3.1)
Make sure to install the full SOA suite using the Advanced Installation Mode.

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 if customer or product data already exists in Oracle 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 Fusion Middleware and Oracle JDeveloper Patches

Install all 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.

To install SOA Suite patches

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 the following table.

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.
5917910	Fixes problems that involve: ■ 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	Fixes problems that involve: ■ 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.

Deployment Steps

The following deployment steps are listed at a high level. Some of the steps are simple, and this section provides instructions for them. Others are described in more detail in subsequent sections.

1 Before you begin:

- Verify EBS Environment for such items as test logons, Concurrent Manager, and Database Connect Strings.
- Verify Siebel Environment for such items as test logons, and Database Connect Strings.
- Verify 10.1.3 Environment for such items as test launch of BPEL Console, ESB Console, and Application Server Control. Deploy and test a simple BPEL Process. Test connectivity from Jdeveloper.
  - NOTE: Required 10.1.3 ST Patches: The following ST patches are required to be installed in the 10.1.3 environment to proceed. Verify with that these are applied.
  - 5917910: ISSUE WITH CREATING <XSL:VARIABLE> WITH VALUE "&#0;" JAVA HEAP ERROR ON SOA 10.1.3.1 GA RELEASE ON LINUX INVOKING PLSQL PROCEDURE WITH LARGE OUTPUT PARAMETER CAUSES OUT-OF-HEAP SPACE
  - 5596476: XSLT MAP NOT RENDERING IN THE UI.
  - 5609537: COMMIT IN CHILD PROCESS HAPPENS EVEN IF THE PARENT BPEL PROCESS IS FAULTED
  - 5931554: XPATH FUNCTION LOOKUP-DVM DOES NOT WORK IN ASSIGN ACTIVITY OF BPEL CROSS REFERENCE FEATURE IN 10.1.3.1. See Post-Installation Instructions for Patch 5931554 on page 21 for further details about this patch.
  - 5473225: UNABLE TO CATCH AN EXCEPTION DURING A TRANSFORM

2 Download and configure a released build for Siebel CRM Integration Pack for Trade Promotion Management:

a Download the required SEBLTPMIntegPkEBSTMv1.0.zip to <SOA Home>\bpel\samples.

b Unzip to SEBLTPMIntegPkEBSTMv1.0 folder.

c Go to <SOA Home>\bpel\samples\SEBLTPMIntegPkEBSTMv1.0\ SEBLTPMIntegPkEBSTM\SetUp.

d Open CRMIntegProcessParametersTPM2TM.xml and, against each parameter name, replace the current parameter value with a current relevant value for deployment of BPEL processes.

3 Make the following changes in CRMIntegProcessParametersTPM2TM.xml:

a Change PARAMVALUE for PARAMNAME "http://127.0.0.1:8888/orabpel/default" to "http://your SOA host: port/orabpel/your bpel domain".

b Change PARAMVALUE for PARAMNAME "http://127.0.0.1:8888/orabpel/xmllib" to http://your SOA host: port/orabpel/xmllib.

c Change PARAMVALUE for PARAMNAME <property name="PARAMNAME">[SIEBEL SERVER LOCATION]</property> to <property name="PARAMVALUE">http://<Siebel Server Location>/eai_enu/start.swe</property>.

d Change PARAMVALUE for PARAMNAME <property name="PARAMNAME">[SIEBEL USERNAME]</property> to <property name="PARAMVALUE"> UserName=<Siebel Username></property>.

e Change PARAMVALUE for PARAMNAME <property name="PARAMNAME">[SIEBEL PASSWORD]</property> to <property name="PARAMVALUE"> Password=<Siebel Password></property>.

4 From the command prompt, navigate to <SOA Home>\bpel\samples\SEBLTPMIntegPkEBSTMv1.0\SEBLTPMIntegPkEBSTM\SetUp\scripts and execute the following command:

- For Windows:

  java -jar EditParam.jar -i <SOA Home>\bpel\samples\SEBLTPMIntegPkEBSTMv1.0\ SEBLTPMIntegPkEBSTM\BusinessProcesses -f <SOA Home>\bpel\samples\SEBLTPMIntegPkEBSTMv1.0\ SEBLTPMIntegPkEBSTM\SetUp\CRMIntegProcessParametersTPM2TM.xml -verbose -t D:\temp

- For Linux:

  <SOA_HOME>/jdk/bin/java -jar EditParam.jar -i <SOA Home>/bpel/samples/ SEBLTPMIntegPkEBSTMv1.0/SEBLTPMIntegPkEBSTM/BusinessProcesses -f <SOA Home>/ bpel/samples/SEBLTPMIntegPkEBSTMv1.0/ SEBLTPMIntegPkEBSTM/SetUp/ CRMIntegProcessParametersTPM2TM.xml -verbose -t /tmp

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

For all the BPEL Processes in the Business Processes folder, all the parameter names set are replaced with the values as set in CRMIntegProcessParametersTPM2TM.xml.

5 Apply prerequisite patches and set up the Oracle E-Business Suite environment. See Configuring the Oracle E-Business Suite Environment on page 21.

6 Apply prerequisite patches and set up the Siebel environment. See Configuring the Siebel Trade Promotion Management Environment on page 33.

7 Perform common integration setups. See Setting Up Common Integration Server (Including DVMs and Common Services) on page 130.

8 Deploy BPEL processes. See Process of Deploying BPEL Processes Using Oracle JDeveloper on page 148.

9 Set syncMaxWaitTime in BPELConsole. The default wait time is only 45 seconds in the BPEL console. Logon to BPELConsole Manage BPEL Domain and set the syncMaxWaitTime value to 120 seconds.

10 Before you start to compile any Siebel artifacts, make sure that the Script Compilation Folder is set correctly:

a In Siebel Tools go to the View > Options > Scripting tab.

b For the Script compilation folder, set the value as (for the ST environment) D:\19224\eappweb\PUBLIC\enu. If you do not set this value, then the configurator launch fails.

Post-Installation Instructions for Patch 5931554

Make sure to follow the post-install step for patch 5931554, especially the following patch post-installation instructions:

To perform post-installation instructions for patch 5931554

1. Execute the sql file $ORACLE_HOME/integration/esb/sql/oracle/xreftables.sql.
2. Restart all managed components if you are on a mid-tier installation:

   `$ORACLE_HOME/opmn/bin/opmnctl startall`
3. Make sure that ASControl is restarted as well, from OS services console.
4. To patch JDev, copy over $ORACLE_HOME/integration/esb/lib/bpm-ide-common.jar to the following:
   a. $JDEV_HOME/integration/lib/ after backing up
   b. $JDEV_HOME/integration/lib/bpm-ide-common.jar

Configuring the Oracle E-Business Suite Environment

This section contains the following information:

- Patches on page 21
- Setting Profile Options for a Customer on page 22
- Defining Oracle Trade Management on page 22

Patches

Oracle E-Business Suite 11.5.10 CU2 and Oracle Trade Management rollup 3 are the baseline for installation. Apply the following Oracle E-Business Suite patches to the Oracle E-Business Suite environment. Patches are listed by Oracle E-Business Suite participating module:

1. Customer
   a. 3618299 (HZ.N)
   b. 4280097 (HZ.N oneoff to fix party merge)
   c. 5046954 (TCA Bakported Business Objects)
   d. 5221609 (Genesis Specific Code for customers)
2. Products
   a. 6021150 (Simple)
   b. 6021155 (back porting business event changes)

3 Trade Management

   a 5929632(OZF)

Setting Profile Options for a Customer

To set profile options for a customer

■ Set the following profile options at the site level as indicated in the following table.

Profile	Value to Set
HZ: Execute API Callouts	All Events Enabled
HZ: Format Business Object Business Events as Bulk	N

Defining Oracle Trade Management

This section covers the definition of the elements of Oracle Trade Management. Complete the following tasks in the order listed:

1 Creating an Employee on page 22

2 Importing a Resource for an Oracle Trade Management User on page 23

3 Creating an Oracle Trade Management User on page 24

4 Setting System Profiles on page 25

5 Setting the Oracle Accounts Receivable System Option for Write-Off Limits on page 26

6 Setting System Parameters on page 26

7 Creating a Budget Approval Bypass Rule on page 27

8 Creating a Trade Profile on page 28

9 Creating a Trade Profile on page 28

Creating an Employee

To create an employee

1 Log into Oracle Forms with HRMS Manager Responsibility.

2 Navigate to People > Enter & Maintain.

3 In the Find Person box, select New.

4 Enter the following information:

- Last Name and First Name
- Title
- Gender
- Type = Employee
- Social Security # (This is checked against existing Social Security numbers.)
- Birth Date

5 Save your work.

6 Select Assignment and enter the following:

- Organization
- Team/Group
- Location
- Supervisor

If a dialog box with Update and Correction buttons appears, then select Correction to revise existing data and Update to create a new record.

7 Save your work.

8 Select Yes to use the new location.

9 Save your work.

Importing a Resource for an Oracle Trade Management User

To import a resource

1 Log into Forms with CRM Administrator responsibility.

2 Navigate to Resource Manager > Maintain Resources > Import Resources.

Resource Category is defaulted to Employee.

3 In the Name field, pick the employee that you created in the step Creating an Employee on page 22.

4 Click Search.

One record appears in Search Results panel.

5 Click Start Import.

The Set Resource Attributes form opens.

6 Click OK.

The Review and Import Selected Resources form opens

7 Click Save Resource.

8 After the confirmation appears, Click OK.

9 Navigate to Resource Manager.

10 Select the user as the resource.

11 Click Details.

12 On the Roles tab, select a role type of Sales and a role of Sales Representative.

13 On the Group tab, select a group with Usages of Sales and TeleSales and Oracle Trade Management.

14 Make sure that the Group Member Role Sales Representative is associated with the above group on the Resource Details window, and save your work.

Creating an Oracle Trade Management User

To create an Oracle Trade Management user

1 Log into Forms with System Administrator responsibility.

2 Navigate to the Security > User > Define > Users form.

3 In the User Name field, enter SIEBEL.

4 In the Person field, pick the employee you created in the step Importing a Resource for an Oracle Trade Management User on page 23.

5 In the Responsibilities block, assign the following responsibilities to the Implementation User:

- General Ledger Super User
- HRMS Manager
- Inventory
- CRM Administrator
- Oracle Trade Management User
- Oracle Trade Management Administrator
- Account Manager
- Workflow User Web Applications
- System Administrator
- Oracle Receivables
- Oracle Payable
- Advanced Pricing
- Receivables Manager

6 Save your work.

7 Assign the resource to the group selected in AMS: Admin Group profile option.

8 Run the concurrent request AMS: Group Access Refresh.

Setting System Profiles

You must set values for budget-related system profiles, deduction-related system profiles, and deduction-related system profiles.

To set system profiles

1 Set values for budget-related system profiles according to the following table:

BR #	Profile Option	Value	Comments
1	OZF: Allow committed budget to exceed total budget	Yes	None
2	OZF: Allow Recalculation of Committed Budget	Yes	None
3	OZF: Validate market and product eligibility between object & budget	No	None

2 Set values for deduction-related system profiles according to the following table:

BR #	Profile Option	Value	Comments
1	OZF: Implement Payables Integrations	Yes	None
2	OZF: Derive Accrual Account during Claims Settlement	No	None
3	OZF: Implement Contra Charge payment method	No	None
4	OZF: AR Credit Method For Rule	Prorate	None
5	OZF: Under Write Off Threshold Approval Required	No	None
6	OZF: AR Credit Method For Installment	Prorate	None
7	OZF: Allow Un-Related Ship To On Claims	Yes	None

3 Use the following table to set values for promotion-related system profiles according to your business requirements:

BR #	Profile Option	Value	Comments
1	OZF: Default phase for Line Group level discounts		None
2	OZF: Default phase for Line level discounts		None
3	OZF: Default phase for Order level discounts		None

BR #	Profile Option	Value	Comments
4	OZF: Default value for print on invoice flag		None
5	OZF: Default Bucket for discount rules		None
6	OZF: Default value for product precedence		None
7	OZF: Offer Override Flag in QP		None
8	OZF: Default value for incompatibility group		None

Setting the Oracle Accounts Receivable System Option for Write-Off Limits

You must set the Oracle Accounts Receivable system option for Write-off Limits Per Receipt to resolve non-invoice deduction with the write-off settlement method.

To set the Accounts Receivable system option for write-off limits

1. Navigate to Receivables, Vision Operations (USA) > Setup > System > Systems Options > Miscellaneous.
2. Set Write-off Limits Per Receipt = -100 to 100.

Setting System Parameters

Use Table 2 to set values for system parameters based on your business requirements.

Table 2. System Parameters for Oracle E-Business Suite

BR #	Name	Description	Comments
1	Set of Books		
2	Accounting Method		
3	GL Accounts		
4	Receivable Batch Source		
5	Credit Memo Transaction Type		
6	Chargeback Transaction Type		
7	Payable Source		
8	Payable Payment Terms		
9	Write Off Activity		

Table 2. System Parameters for Oracle E-Business Suite

BR #	Name	Description	Comments
10	Claim Type		
11	Claim Reason		

Creating a Budget Approval Bypass Rule

Use the following procedure to create approval rules to bypass the budget approval workflow.

To bypass the budget approval workflow

1. Log into CRM self service as user SIEBEL with Oracle Trade Management User responsibility.
2. Navigate to Administration > Trade Management > Setup > Approval Rule > Create.
3. Enter the following information and click Create:
   - Approval Rule Name
   - Start Date
   - Approval Rule For = Root Budget Request
   - Budget Category = SIEBEL
   - Setup Type = SIEBEL FIXED FUND
   - Minimum Amount = 0

   The Approvers table appears in the bottom half of the window.
4. Enter the following information and click Update:
   - Order=1
   - Type=User
   - User/Role=the user that you just created

   The application successfully creates a bypass approval rule for the fixed fund.
5. Navigate to Administration > Trade Management > Setup > Approval Rule > Create.
6. Enter the following information and click Create:
   - Approval Rule Name
   - Start Date
   - Approval Rule For = Root Budget Request
   - Budget Category = SIEBEL
   - Setup Type = SIEBEL LIVE FUND
   - Minimum Amount = 0

   The Approvers table appears in the bottom half of the window.

7 Enter the following information and click Update:

- Order=1
- Type=User
- User/Role=the user that you just created

The application successfully creates a bypass approval rule for the accrual fund.

Creating a Trade Profile

This section covers the creation of a trade profile.

NOTE: The values defined in a customer's trade profile override the values set in system parameters, which are set as defined in Setting System Parameters on page 26.

Complete these tasks in the order listed:

1 Entering Basic Customer Information on page 28

2 Defining Autopay Parameters on page 29

3 Defining Claim Parameters on page 29

4 Defining Earnings Payments Parameters on page 30

5 Defining a Valid Pair for Deduction Type and Deduction Reason on page 31

Entering Basic Customer Information

Use the following procedure to enter basic customer information.

To enter basic customer information

1 Log in to Oracle Trade Management.

2 Navigate to Administration > Trade Management > Customer > Trade Profiles.

3 On the Trade Profile Overview page, click Create.

4 Enter the basic customer information in the Party Name, Account Number, Site Use, and Address fields.

a If the customer already has a trade profile, then it is displayed when you select the party name or account number.

b The primary Bill To site for the account is displayed by default. To change the site, click the icon next to the Site Use and select another site.

Sites are striped by organization. As such, the site can be used only within an operating unit.

5 If the customer is also a vendor, then enter the vendor information in the Vendor, Vendor Site, and Address fields.

a A vendor is a person or company that sells to your company. Vendors are set up in Oracle Payables and are separate from TCA. To settle claims using a check, you must set up that customer as a vendor in Oracle Payables and Purchasing.

b Values for Vendor and Vendor Site are mandatory for the Checkbook-Check Settlement method.

c The trade profile provides a link between the two setups in the two systems. Vendor information on claims is completed automatically. Therefore, claim processors do not need to determine this. Vendors are not striped by organization. They can be seen and used across operating units. If the vendor is not set up in the trade profile, then the claim owner must enter the vendor information on the first claim to be settled by check for this account. When this occurs, the trade profile information for the account is updated automatically.

Defining Autopay Parameters

If Autopay is used, then it evaluates the accruals for this customer and automate payments as required. If it is not used, then automatic payments are not made even if accruals exist. To define Autopay parameters for the Trade profile, use this procedure, which continues from the previous step.

To define Autopay parameters for this customer

1 Select the Autopay check box.

2 Enter a numeric value in Frequency and select a Frequency Unit.

Together, these values define the frequency with which the customer is paid. These values override those in system parameters. For example, if you enter 1 as the frequency and select month as the frequency unit, then this customer is paid once a month as long as the threshold amount is met.

3 Enter a Threshold Amount.

The threshold amount is also used to trigger Autopay. The threshold currency is the functional currency of the set of books selected in system parameters. For example, if frequency is set to once each month and the threshold amount is $100, then the customer is paid whenever one of these two conditions is met.

4 Select a Payment Method:

- Check: If selected, then you must fill in vendor and vendor sites fields.
- On Account Credit Memo: If selected, then you must fill in the Site Use field. This field retrieves the Bill-to Site of the customer account.

Defining Claim Parameters

To define Autopay parameters for the Trade profile, use this procedure, which continues from the previous step.

To define autopay claim parameters

1 Enter the days due.

Claim managers may require that claims for this account are resolved within a certain number of days. Enter that number here.

For example, your company may require that all claims for an important customer account are resolved with 15 days of creation. In the customer trade profile, you can assign 15 as the default days due. If a claim for this customer account is created on January 1, then the due date defaults to January 16.

2 Enter values for the overpayment and deduction writeoff thresholds.

Deductions and overpayments less than the amounts specified here are automatically written off.

Threshold example are as follows:

- Writeoff Threshold (Deduction) example: Suppose that you enter 200 as the threshold. If you receive a deduction of $190, then it is under the threshold and is eligible for automatic writeoff. Always enter a positive number here.
- Writeoff Threshold (Overpayment) example: Suppose that you enter 150 as the threshold. If you receive an overpayment of $140, then it is under the threshold and is eligible for automatic writeoff.

Defining Earnings Payments Parameters

The values selected for earnings payment parameters for a trade profile determine customer eligibility and the threshold for unearned payments for offers. These affect all promotional claims and deductions except those related to scan data offers, whether they are settled by credit memo or check. If a customer does not have a trade profile, then the application behaves as if the trade profile setting is Null.

If no explicit threshold is set either on the System Parameters page or on the trade profile, but unearned payments are allowed, then the threshold is zero. Claim payment within the thresholds can be settled like any other promotional claim and go through the regular claim approval process.

To define earnings and payments parameters for the Trade profile, use this procedure, which continues from the previous step.

To define earning and payments parameters

1 Select a value for the Unearned Payments for Offers field:

- Null: The customer may or may not be eligible for unearned payments depending on the system parameter setting. If set to Allow for All, then this customer is eligible for unearned payments. If set to Allow for Selected, then this customer is not eligible for unearned payments.
- Allow: Unearned payments are always allowed for this customer. This setting overrides the system parameter setting.
- Disallow: The customer is not eligible for unearned payments for offers regardless of the system parameter setting.

2 Select a threshold type:

- Amount: Threshold is a currency amount. If 50 is entered in the threshold field, then the threshold is $50. (Assuming the currency being used is U.S. dollars.)
- Percent: Threshold is a percentage. If 90 is enter in the threshold field, then the threshold is 90% of the earnings.
- Unconditional: The threshold is infinity. Special approval for overriding the unearned payments threshold is never required. Claims simply go through the regular claim approval process.

3 Enter a value in the Threshold field.

This value can be greater than 100 if the threshold type is Percent.

- Example for Percent: The threshold is 20%. Customer Y's earnings total $10,000 for an offer. Claim payments up to $12,000 can be made.
- Example for Amount: The value is 2,000, and the functional currency is $. Customer Y's earnings total $10,000 for an offer. Claim payments up to $12,000 can be made.

4 Select the Override Threshold check box to allow the initiation of settlements for unearned payments where the amount is greater than the threshold.

These claims are subject to both the regular approval process and a special approval process, and. This setting overrides the setting on the System Parameters page.

Defining a Valid Pair for Deduction Type and Deduction Reason

Several valid combinations of claim (deduction) type and claim reason exist in Siebel Trade Promotion Management. Therefore you must create a claim type and a claim reason in the Trade Management Page and set a valid combination in the System Parameter page. Table 3 lists valid combinations of claim type and reason type in Siebel Trade Promotion Management. For example, you can create Promotion as a value for Claim Type and Bill Back an associated value for Reason and set the values in the system parameter to default.

Table 3. Valid Combinations of Claim Type and Reason Type

Claim Type	Reason Type
Invoicing	Coupon, Discount, Penalty, Post-audit, Price, Quantity
Unsaleable	Expired, Packaging, Penalty, Post-audit, Spoiled
Returns	Discontinued, Penalty, Post-audit, Product, Quantity
Transportation	Delivery time, Location, Pallet config, Penalty, Post-audit
Unknown	No OOTB option
Promotion	Bill Back, Fixed, Intro Marketing, Off Invoice, Penalty, Post-audit, Slotting

To create a claim type

1. Navigate to Oracle Trade Management > Administration > Claim -> Claim Type.
2. Click Create.
3. Refer to Table 3 and enter a valid claim type.

To create a claim reason

1. Navigate to Oracle Trade Management > Administration > Claim -> Claim Reason.
2. Click Create.
3. Refer to Table 3 and enter a valid claim reason.

Defining a Claim Default Setup

For any deduction created from Oracle Receivables, you must set a valid pair of type and reason.

To define a claim default setup

1. Navigate to Oracle Trade Management > Administration > Claim > Claim Defaults.
2. Use the following example to set default values:
   a. Claim Source to Invoice Deduction
   b. Custom Setup to SIEBEL DEDUCTION
   c. Claim Type to Promotion
   d. Claim Reason to Bill Back
   e. Start Date to some valid date

Defining the Indirect Sales Parameters

The values defined in a customer's trade profile override the values set in system parameters.

To define the indirect sales parameters

1. Set the batch tolerance as follows:
   a. For Batch Tolerance Type, select Percent or Amount.
   b. Enter a numeric value in the Batch Tolerance field.
2. Set the line tolerance as follows:
   a. For Line Tolerance Type, select Percent or Amount.
   b. Enter a number value in the Line Tolerance Field
3. To finish, click Update.

Enabling a Business Event

You must enable two business events.

To enable business events

1. Navigate to Workflow Administrator Web Applications responsibility > Business Events.
2. Search for each of the following business events and enable it from the Details screen:
   - oracle.apps.ozf.order.accrual.info
   - oracle.apps.ozf.bpel.claim

Configuring the Siebel Trade Promotion Management Environment

This section lists the setups, patches and manual steps that must be performed in the Siebel Trade Promotion Management environment during integration.

Applying Quick Fix

You must apply Siebel 8.0[20405]QF2007 Quick Fix.

To apply the quick fix

1. Install Siebel Tools 8.0[20405].
2. Download Siebel Tools 8.0[20405]QF2007 from ftp.siebel.com:

   `ftp://ftp.siebel.com/staging/8.0sba_20405_W32_QF2007`

3. Expand the downloaded file.
4. Navigate to [local directory]\8.0[20405]QF2007 \Release\Windows\Client\Siebel_Tools and double click install.exe.

   Siebel Tools 8.0SIA[20405] is patched, and the quick fix is installed.

5. Navigate to the Siebel Tools home directory, open the REPPATCH folder, and confirm that the following sif files have been imported into Siebel Tools:
   - ACR358_GenesisErrorHandler.sif
   - ACR358_Accounts.sif
   - ACR358_Products.sif
   - ACR358_Deductions.sif
   - ACR358_Funds.sif
   - ACR358_Promotions.sif

Subsequent sections describe applying any prerequisite patches and using the sif files for setting up the Siebel environment.

Verifying that Component Groups Are Enabled

After the Siebel servers are installed, verify that required component groups are enabled.

To verify that the component groups are enabled

1. Navigate to Site Map > Administration - Server Configuration > Component Groups.
2. Query for Name as Enterprise Application Integration or Alias as EAI.
3. Query for Name as Siebel eConsumerSector or Alias as eConsumer.
4. Query for Name as Workflow Management or Alias as Workflow.

If any of the above component groups are not enabled, click Enable to activate the component groups.

Setting Up Customer Integration

This section includes the following setups:

- Preparing for the Customer Integration Setup
- Setting Up a Siebel Trade Promotion Management Inbound Customer
- Setting Up Siebel Trade Promotion Management Client
- Setting Up Funds
- Setting Up Deductions
- Setting Up Promotions

Preparing for the Customer Integration Setup

To prepare for setting up customer integration, complete the following procedure.

To modify the configuration file for the customer integration setup

1. In Siebel Tools, navigate to $SiebsrvrHome\bin\enu.
2. In the Tools.cfg file, change SymStrPrefix from X_ to SBL_.
3. Re-login to Siebel Tools.

Setting Up a Siebel Trade Promotion Management Inbound Customer

Projects

To set up projects

1 Log in to Siebel 8.0 Tools and lock the following projects:

New?	Name	Description
Modified	Account	Modified Account BC, Added New Bus Service and Int Object.
Modified	Account (SCW)	Modified applets

2 Import ACR358_Accounts.sif from the Siebel Quick Fix build, which contains new and modified repository objects.

3 For each repository object, shut down Siebel Server and compile the locked projects into the server .srf file.

Business Component

Name: Account (Modified)

Table 4. Multi Value Link

New?	Name	Description
Modified	Business Address	Auto Primary is selected.

Applet

Name: Account Address List Applet (SCW)

Table 5. List Columns

New?	Name	Description	Comments
New	Bill To	Mapped to Bill Address Flag field	By default, this flag must not be checked when a new address is created.
New	Ship To	Mapped to Ship Address Flag field	By default, this flag must not be checked when a new address is created.

Integration Object

- Name: CGInternalAccountInterface (New)
- Project: Account
- Base Object Type: Siebel Business Object
- External Name: Account
- XML Tag: ListOfCgInternalAccountInterface

Integration Components

- Name & External Name: Account
- Parent Integration Component: None
- XML Container Element: None
- XML Tag: Account
- Cardinality: Zero or More

Table 6. Integration Component Fields

Name	Length	Type	External Name	External Data Type	XML Style	XML Tag
Name	100	Data	Name	DTYPE_TEXT	Element	Name
Account Id	30	Data	Id	DTYPE_ID	Element	AccountId
Account Organization Integration Id	30	Data		DTYPE_TEXT	Element	None
Competitor Flag		Data	Competitor	DTYPE_BOOL	Element	CompetitorFlag
CSN	30	Data	CSN	DTYPE_TEXT	Element	CSN
Created	30	Data	Created	DTYPE_DATETIME	Element	Created
Currency Code	15	Data	CurrencyCode	DTYPE_TEXT	Element	CurrencyCode
Description	255	Data	Description	DTYPE_TEXT	Element	Description
Division	25	Data	Division	DTYPE_TEXT	Element	Division
Location	50	Data	Location	DTYPE_TEXT	Element	Location
Main Phone Number		Data	Main Phone Number	DTYPE_TEXT	Element	MainPhoneNumber
Main Fax Number		Data	Main Fax Number	DTYPE_TEXT	Element	MainFaxNumber
Partners	100	Data	Partners	DTYPE_TEXT	Element	Partners

Table 6. Integration Component Fields

Name	Length	Type	External Name	External Data Type	XML Style	XML Tag
Revenue Growth		Data	Revenue Growth	DTYPE_NUMBER	Element	RevenueGrowth
Key Competitors	100	Data	Key Competitors	DTYPE_TEXT	Element	KeyCompetitors
Account Status	24	Data	Account Status	DTYPE_TEXT	Element	AccountStatus
Type	30	Data	Type	DTYPE_TEXT	Element	Type
Alias	50	Data	Alias	DTYPE_TEXT	Element	Alias
Assignment Area Code	5	Data	Assignment Area Code	DTYPE_TEXT	Element	AssignmentAreaCode
Assignment Country Code	5	Data	Assignment Country Code	DTYPE_TEXT	Element	AssignmentCountryCode
Disable DataCleansing		Data	Disable DataCleansing	DTYPE_TEXT	Element	DisableDataCleansing
Integration Id	30	Data	Integration Id	DTYPE_TEXT	Element	IntegrationId
Language Code		Data	Language Code	DTYPE_ID	Element	LanguageCode
Region	25	Data	Region	DTYPE_TEXT	Element	Region
Home Page		Data	Home Page	DTYPE_TEXT	Element	HomePage
Parent Account Name	100	Data	Parent Account Name	DTYPE_TEXT	Element	ParentAccountName
Partner Flag		Data	Partner Flag	DTYPE_TEXT	Element	PartnerFlag
DUNS Number	15	Data	DUNS Number	DTYPE_TEXT	Element	DUNSNumber
Domestic Ultimate DUNS	15	Data	Domestic Ultimate DUNS	DTYPE_TEXT	Element	DomesticUltimateDUNS
Parent HQ DUNS	15	Data	Parent HQ DUNS	DTYPE_TEXT	Element	ParentHQDUNS

Integration Component Key

Table 7. Integration Component Key

Key Name	Key Type	Sequence	Sequential Key Fields	Comments
V77 Wizard-Generated User Key:1	User Key	1	Account Id	None
V77 Wizard-Generated User Key:2	User Key	2	Integration Id	None
V77 Wizard-Generated User Key:3	User Key	3	1 Location 2 Name 3 Primary Organization	None
Status Key	Status Key	4	1 Operation 2 Account Id 3 Integration Id	None

Integration Components

- Name & External Name: Account_Business Address & CUT Address
- Parent Integration Component: Account
- XML Container Element: ListOfAccount_BusinessAddress
- XML Tag: Account_BusinessAddress
- Cardinality: Zero or More

Table 8. Integration Component Fields

Name	Length	Type	External Name	External Data Type	XML Style	XML Tag
Address Active Status		Data	Address Active Status	DTYPE_TEXT	Element	AddressActiveStatus
Address Id	30		Address Id	DTYPE_ID	Element	AddressId
Address Integration Id	30	Data	Address Integration Id	DTYPE_TEXT	Element	AddressIntegration Id

Table 8. Integration Component Fields

Name	Length	Type	External Name	External Data Type	XML Style	XML Tag
Bill Address Flag		Data	Bill Address Flag	DTYPE_TEXT	Element	BillAddressFlag
City	50	Data	City	DTYPE_TEXT	Element	City
Country	30	Data	Country	DTYPE_TEXT	Element	Country
County	50	Data	County	DTYPE_TEXT	Element	County
Email Address	50	Data	Email Address	DTYPE_TEXT	Element	EmailAddress
Fax Number		Data	Fax Number	DTYPE_TEXT	Element	FaxNumber
Main Address Flag		Data	Main Address Flag	DTYPE_TEXT	Element	MainAddress Flag
Phone Number		Data	Phone Number	DTYPE_TEXT	Element	PhoneNumber
Postal Code	30	Data	Postal Code	DTYPE_TEXT	Element	PostalCode
Province	50	Data	Province	DTYPE_TEXT	Element	Province
Ship Address Flag		Data	Ship Address Flag	DTYPE_TEXT	Element	ShipAddressFlag
State	10	Data	State	DTYPE_TEXT	Element	State
Street Address	200	Data	Street Address	DTYPE_TEXT	Element	StreetAddress
Street Address 2	100	Data	Street Address 2	DTYPE_TEXT	Element	Street Address 2

Integration Component Key

Table 9. Integration Component Key

Key Name	Key Type	Sequence	Sequential Key Fields	Comments
V77 Wizard-Generated User Key:1	User Key	1	Address Integration Id	None
V77 Wizard-Generated User Key:2	User Key	2	Address Id	None

Table 9. Integration Component Key

Key Name	Key Type	Sequence	Sequential Key Fields	Comments
V77 Wizard-Generated User Key:3	User Key	3	1 City 2 State 3 Street Address	None
Status Key	Status Key	4	1 Address Id 2 Address Integration Id 3 Operation	None

Integration Components

- Name & External Name: Account_Industry & Industry
- Parent Integration Component: Account
- XML Container Element: ListOfAccount_Industry
- XML Tag: Account_Industry
- Cardinality: Zero or More

Table 10. Integration Component Fields

Name	Length	Type	External Name	External Data Type	XML Style	XML Tag
Industry	50	Data	Industry	DTYPE_TEXT	Element	Industry
Industry Id	30	System	Industry Id	DTYPE_ID	Element	Industry Id
Industry Integration Id	30	Data	Industry Integration Id	DTYPE_TEXT	Element	Industry Integration Id
IsPrimaryMVG	1	System	IsPrimaryMVG	DTYPE_TEXT	Element	IsPrimaryMVG

Integration Component Key

Table 11. Integration Component Key

Key Name	Key Type	Sequence	Sequential Key Fields	Comments
V77 Wizard-Generated User Key:1	User Key	1	Industry Id	None
V77 Wizard-Generated User Key:2	User Key	2	Industry Integration Id	None
V77 Wizard-Generated User Key:3	User Key	3	Industry	None
V77 Wizard-Generated User Key:4	User Key	4	SIC Code	None

Integration Components

- Name & External Name: Account_Organization & Internal Division
- Parent Integration Component: Account
- XML Container Element: ListOfAccount_Organization
- XML Tag: Account_Organization
- Cardinality: Zero or More

Table 12. Integration Component Fields

Name	Length	Type	External Name	External Data Type	XML Style	XML Tag
Organization	50	Data	Organization	DTYPE_TEXT	Element	Organization
Organization Id	30	Data	Organization Id	DTYPE_ID	Element	Organization Id
Organization Integration Id	30	Data	Organization Integration Id	DTYPE_TEXT	Element	Organization IntegrationId
IsPrimaryMVG	1	System	IsPrimaryMVG	DTYPE_TEXT	Attribute	IsPrimaryMVG

Integration Component Key

Table 13. Integration Component Key Fields

Key Name	Key Type	Sequence	Sequential Key Fields	Comments
V77 Wizard-Generated User Key:1	User Key	1	Organization Id	None
V77 Wizard-Generated User Key:2	User Key	2	Organization Integration Id	None
V77 Wizard-Generated User Key:3	User Key	3	Organization	None

Integration Components

- Name & External Name: Account_Organization & Internal Division
- Parent Integration Component: Account
- XML Container Element: ListOfAccount_Organization
- XML Tag: Account_Organization
- Cardinality: Zero or More

Table 14. Integration Component Fields

Name	Length	Type	External Name	External Data Type	XML Style	XML Tag
Organization	50	Data	Organization	DTYPE_TEXT	Element	Organization
Organization Id	30	Data	Organization Id	DTYPE_ID	Element	Organization Id
Organization Integration Id	30	Data	Organization Integration Id	DTYPE_TEXT	Element	Organization IntegrationId
IsPrimaryMVG	1	System	IsPrimaryMVG	DTYPE_TEXT	Attribute	IsPrimaryMVG

Integration Component Key

Table 15. Integration Component Key Fields

Key Name	Key Type	Sequence	Sequential Key Fields	Comments
V77 Wizard-Generated User Key:1	User Key	1	Organization Id	None
V77 Wizard-Generated User Key:2	User Key	2	Organization Integration Id	None
V77 Wizard-Generated User Key:3	User Key	3	Organization	None

Integration Components

- Name & External Name: Account_Position & Position
- Parent Integration Component: Account
- XML Container Element: ListOfAccount_Position
- XML Tag: Account_Position
- Cardinality: Zero or More

Table 16. Integration Component Fields

Name	Length	Type	External Name	External Data Type	XML Style	XML Tag
Position	50	Data	Position	DTYPE_TEXT	Element	Position
Position Id	30	System	Position Id	DTYPE_ID	Element	PositionId
Position Integration Id	30	Data	Position Integration Id	DTYPE_TEXT	Element	PositionIntegration Id
IsPrimaryMVG	1	System	IsPrimaryMVG	DTYPE_TEXT	Attribute	IsPrimaryMVG

Integration Component Key

Table 17. Integration Component Key Fields

Key Name	Key Type	Sequence	Sequential Key Fields	Comments
V77 Wizard-Generated User Key:1	User Key	1	Account Id	None
V77 Wizard-Generated User Key:2	User Key	2	Integration Id	None
V77 Wizard-Generated User Key:3	User Key	3	1 Location 2 Name 3 Primary Organization	None
Status Key	Status Key	4	1 Operation 2 Account Id 3 Integration Id	None

Integration Components

- Name & External Name: Account_Business Address & CUT Address
- Parent Integration Component: Account
- XML Container Element: ListOfAccount_BusinessAddress
- XML Tag: Account_BusinessAddress
- Cardinality: Zero or More

Table 18. Integration Component Fields

Name	Length	Type	External Name	External Data Type	XML Style	XML Tag
Address Active Status		Data	Address Active Status	DTYPE_TEXT	Element	AddressActiveStatus
Address Id	30		Address Id	DTYPE_ID	Element	AddressId
Address Integration Id	30	Data	Address Integration Id	DTYPE_TEXT	Element	AddressIntegration Id

Table 18. Integration Component Fields

Name	Length	Type	External Name	External Data Type	XML Style	XML Tag
Bill Address Flag		Data	Bill Address Flag	DTYPE_TEXT	Element	BillAddressFlag
City	50	Data	City	DTYPE_TEXT	Element	City
Country	30	Data	Country	DTYPE_TEXT	Element	Country
County	50	Data	County	DTYPE_TEXT	Element	County
Email Address	50	Data	Email Address	DTYPE_TEXT	Element	EmailAddress
Fax Number		Data	Fax Number	DTYPE_TEXT	Element	FaxNumber
Main Address Flag		Data	Main Address Flag	DTYPE_TEXT	Element	MainAddressFlag
Phone Number		Data	Phone Number	DTYPE_TEXT	Element	PhoneNumber
Postal Code	30	Data	Postal Code	DTYPE_TEXT	Element	PostalCode
Province	50	Data	Province	DTYPE_TEXT	Element	Province
Ship Address Flag		Data	Ship Address Flag	DTYPE_TEXT	Element	ShipAddressFlag
State	10	Data	State	DTYPE_TEXT	Element	State
Street Address	200	Data	Street Address	DTYPE_TEXT	Element	StreetAddress
Street Address 2	100	Data	Street Address 2	DTYPE_TEXT	Element	Street Address 2

Integration Component Key

Table 19. Integration Component Fields

Key Name	Key Type	Sequence	Sequential Key Fields	Comments
V77 Wizard-Generated User Key:1	User Key	1	Position Id	None

Table 19. Integration Component Fields

Key Name	Key Type	Sequence	Sequential Key Fields	Comments
V77 Wizard-Generated User Key:2	User Key	2	Position Integration Id	None
V77 Wizard-Generated User Key:3	User Key	3	1 Division 2 Position	None

Integration Object User Prop

Table 20. Integration Object User Prop

Name	Value	Comments
AllLangIndependentVals	N	None
XMLTagNamespace	http://www.siebel.com/xml/CGInternalAccountInterface	None
XSDTypeNamespace	http://www.siebel.com/xml/CGInternalAccountInterface	None

Business Service

- Name & Display Name: SEBLCGIntegAccount (New)
- Class: CSSEAIDataSyncService
- External Use: Y

- State Management Type: Stateful

Table 21. Business Service Methods

Name	Display Name
Delete	Delete
Insert	Insert
InsertOrUpdate	Insert or Update
Synchronize	Synchronize
Update	Update

Table 22. Business Service Method Arguments

Name	Data Type	Integration Object	Type	Optional	Storage Type	Display Name	Comments
SiebelMessage	Integration Object	CGInternalAccountInterface	Input / Output	N	Hierarchy	Account Interface	None
StatusObject	String		Input	Y	Property	Status Object	Pick Field = Id

Table 23. Business Service Methods

Name	Display Name
QueryByExample	Query by Example

Table 24. Business Service Method Arguments

Name	Data Type	Integration Object	Type	Optional	Storage Type	Display Name	Comments
SiebelMessage	Integration Object	CGInternalAccountInterface	Input / Output	N	Hierarchy	Account Interface	None

Table 25. Business Service Methods

Name	Display Name
QueryByID	Query by ID

Table 26. Business Service Method Arguments

Name	Data Type	Integration Object	Type	Optional	Storage Type	Display Name	Comments
PrimaryRowId	String		Input	N	Property	ID	None
SiebelMessage	Integration Object	CGInternalAccountInterface	Output	N	Hierarchy	CGInternalAccountInterface	None

Table 27. Business Service User Prop

Name	Value
Application Services Interface	Y
Internal Integration Object	CGInternalAccountInterface

Setting Up Siebel Trade Promotion Management Client

To set up Siebel Trade Promotion Management Client

1. Navigate to Site Map > Administration - Web Services > Inbound Web Services.
2. Import the SEBLCGIntegAccount Web Service.

   The Web Service xml file is available in <BuildLocation>\SEBLTPMIntegPkEBSTM\ApplicationChanges\SiebelCRMSIA\8.0\Customer\WebServices\SEBLCGIntegAccount.xml
3. Validate the address of the Siebel server name in the Service Ports applet.

   The address must have the correct Siebel server name that the client connects to.

4 Provide a valid user name and password.

Service Port:

Name	Type	Business Service / Process	Transport	Address	Binding
SEBLCGIntegAccount	Business Service	Siebel Account	HTTP	http://<webserver>/eai_<lang>/start.swe?SWEExtSource=SecureWebService&SWEExtCmd=Execute&UserName=<UserName>&Password=<Password>	SOAP_RPC_LITERAL

Operations:

Name	Method Display Name	Authentication Type
SEBLCGIntegAccount Delete	Delete	None
SEBLCGIntegAccount Insert	Insert	None
SEBLCGIntegAccount InsertOrUpdate	Insert or Update	None
SEBLCGInSEBLCGIntegAccount QueryByExample	Query by Example	None
SEBLCGIntegAccount QueryById	Query by ID	None
SEBLCGIntegAccount Synchronize	Synchronize	None
SEBLCGIntegAccount Update	Update	None

5 Click Clear Cache.

Setting Up Product Integration

Repository Changes for Simple Products

Project

To make repository changes in a project

1 Log in to Siebel 8.0 Tools and lock the following projects:

New?	Name	Description
New	CG Products Interface	Holds CG Product Integration related new objects
Modified	ISS VOD Import Export	Modify Object Product ImpExp BC and ISS Prod Def ImpExp
Modified	Symbolic Strings	None

2 Import ACR358_Products.sif from the Siebel Quick Fix build, which contains new and modified repository objects.

The table below gives you a description of changes for each repository object:

Business Component

Object Product ImpExp BC (Modified)

Name	Column	Force Active	PickList	Type	Text Length
Description	DESC_TEXT	Y		DTYPE_TEXT	255
IntegrationId	INTEGRATION_ID	Y		DTYPE_TEXT	30
Status	STATUS_CD	Y	PickList Impl Phase	DTYPE_TEXT	30

- Integration Object: ISS Prod Def ImpExp (Modified)
- Integration Component: Object Linked Items ImpExp BC
- Integration Component Fields:

Name	XML Tag
Context Variable Name	ContextVariableName

Object Product Bu ImpExp BC

Integration Component Fields

Name	Date Type	Required	User Visible	Type	External Name	External Required	XML Style	XML Tag
Org Id	DTYPE_ID	Y	Y	Data	Org Id	Y	Element	OrgId

Integration Component Key

Name	Key Sequence Number	Key Type
User Key:2	2	User Key

Integration Component Key Field

Name	Field Name	Sequence
Prod Int Name	Prod Int Name	1

Object Product ImpExp BC

Integration Component Field

Name	Date Type	Length	User Visible	Type	External Name	External Data Type	External Length	XML Style	XML Tag
Description	DTYPE_TEXT	250	Y	Data	Description	DTYPE_TEXT	250	Element	Description
IntegrationId	DTYPE_TEXT	30	Y	Data	IntegrationId	DTYPE_TEXT	30	Element	IntegrationId
Status	DTYPE_TEXT	30	Y	Data	Status	DTYPE_TEXT	30	Elemnt	Status

Integration Component Key

Name	Inactive
User Key:1	Y

Name	Sequence	Key Type
User Key:2	1	User Key

Integration Component Key Field

Name	Field Name	Sequence
VOD Object Num	VOD Object Num	1

Integration Object User Prop

Name	Value
XMLTagNamespace	http://www.siebel.com/xml/ISSProdDefImpExp
XSDTypeNamespace	http://www.siebel.com/xml/ISSProdDefImpExp

ISS Prod Def ImpExp - External (New)

1 Create a copy of ISS Prod Def ImpExp.

2 Change Name to ISS Prod Def ImpExp - External and Base Object Type to XML.

Symbolic Strings

Name	Current String Value	Definition
SBL_CS_CREATE_SIMPLE_PRODUCT	CS Create Simple Product	Business Service Display Name for CRMIntegSEBLCreateSimpleProduct
SBL_CS_FORMAT_MESSAGE_AND_IMPORT_PRODUCT	CS Format Message and Import Product	Business Service Display Name for CSIntegSEBLFormatMsgandProductImp

Business Service

New?	Name	Cache	Class	Display Name - String Reference
New	CRMIntegSEBLCreateSimpleProduct	Y	CSSEAIDTEScriptService	SBL_CS_CREATE_SIMPLE_PRODUCT

Business Service Method

Name	Display Name - String Reference
Execute	SBL_EXECUTE-1004225048-07T

Business Service Method Arg

Name	Data Type	Type	Optional	Storage Type
MapName	String	Input		Property
OutputIntObject Name	String	Input	Y	Property
SiebelMessage	Hierarchy	Input / Output	Y	Hierarchy

New?	Name	Class	Display Name - String Reference
New	CSIntegSEBLFormatMsgandProductImp	CSSService	SBL_CS_FORMAT_MESSAGE_AND_IMPORT_PRODUCT

Name	Display Name - String Reference
FormatMessage	SBL_UMS_FormatMessage

Business Service Method Arg

Name	Data Type	Type	Optional	Storage Type
SiebelMessage	Integration Object	Input	Not Applicable	Hierarchy

NOTE: Verify Server Script in both Business Services

Workflow

CSIntegSEBLSimpleProductInboundFlow (New)

Table 28. Workflow Process Property

Name	In/Out	Business Object	Data Type	Integration Object
Error Code	None	VOD ImpExp BO	String	
Error Message	None	VOD ImpExp BO	String	
InternalSiebelMessage	Out	VOD ImpExp BO	Integration Object	ISS Prod Def ImpExp
Object Id	None	VOD ImpExp BO	String	
Process Instance Id	None	VOD ImpExp BO	String	
Siebel Operation Object Id	None	VOD ImpExp BO	String	
SiebelMessage	In	VOD ImpExp BO	Integration Object	ISS Prod Def ImpExp - External

Table 29. Workflow Steps

Name	Type	Business Service Name	Business Service Method	Input Argument	Output Argument
Start	Start	None	None	None	None
Format Siebel Message	Business Service	CRMIntegSEBLCreateSimpleProduct	FormatMessage	SiebelMessage	None
Map Oracle Items to Siebel Products	Business Service	CSIntegSEBLFormatMsgandProductImp	Execute	MapName, SiebelMessage	SiebelMessage
End	End	Not Applicable	Not Applicable	Not Applicable	Not Applicable

Workflow Deployment

To deploy workflows

1. Log in to Siebel Tools and navigate to Workflows.
2. Right click and select the Import workflow process.
3. Enter the workflows listed above.

4 Select the Project as CG Products Interface and click OK.

5 Query for the workflow and deploy the workflow by clicking Publish/Activate button on the WF/Task Editor Toolbar.

Toolbar is visible by selecting View > Toolbars > WF/Task Editor Toolbar.

6 Log in to the Siebel UI, navigate to Administration > Business Processes > Workflow Deployment.

7 Query for the Workflow deployed and click Activate.

Web Service Deployment

To deploy Web Services

1 Log in to Siebel UI and navigate to Administration > Web Services > Inbound Web Services.

2 Click Import and specify CSIntegSEBLSimpleProductInboundFlow_WS.xml as the Web Service to be imported.

3 After the import is complete, verify that the address in the Service Ports applet has the correct Siebel server name that the client should connect to.

If required, change the address and provide a valid username and password.

Namespace	Name	Status	Comment
http://siebel.com/asi/	CSIntegSEBLSimpleProductInboundFlow	Active	None

Service Ports

Name	Type	Business Service	Transport	Address	Binding
CSIntegSEBLSimpleProductInboundFlow	Workflow Process	CSIntegSEBLSimpleProductInboundFlow	HTTP	http://<webserver>/eai_<lang>/start.swe?SWEExtSource=SecureWebService&SWEExtCmd=Execute&UserName=<UserName>&Password=<Password>	SOAP_RPC_LITERAL

Operations

Name	Method Display Name	Authentication Type
CreateProduct	RunProcess	None

4 Click Clear Cache.

Create a Project Workspace

To create a project workspace

1 Log in to the Siebel application and navigate to Site Map > Administration - Product > Workspace Projects.

2 Create a new workspace project with the name as CRMIntegProductWS.

Create an Organization in Siebel

Create an Organization in Siebel similar to the Organization in Oracle E-Business Suite which is used in the business. For example, if Vision Operations is an Organization created in the Oracle E-Business Suite application, create Vision Operations as an Organization in the Siebel application as well.

To create an organization in Siebel

1. Log in to the Siebel application, and navigate to Site Map > Administration - Group > Organization.
2. Create a new organization.

Setting Up Funds

Repository Changes for Funds

To import Siebel Artifacts

1. Log in to Siebel 8.0 Tools and lock the following projects:

New?	Project	Description
New	CS CG Fund Integration	Holds CG Fund Integration related objects (It is a new project, so it would be available for initial import)
Modified	CPG Fund	Modify CS Account Fund BC to apply date specific validations at Fund level
Modified	CS CG MDF Planning	Modify Shipment and Revenue read only at Source Product level
Modified	CPG Account Fund	Added Status field on the form applet
Modified	Symbolic Strings	None

2 Import the ACR358_Funds.sif file from the Siebel Quick Fix build.

This contains new and modified repository objects. The following table gives the description of changes for each repository object.

Symbolic Strings

Name	Current String Value	Definition
SBL_CS_FUND_CREATE_-_SIEBEL_OUTBOUND	CS Fund Create - Siebel Outbound	Business Service Display Name for CS Fund Outbound WS
SBL_CS_FUND_UPDATE_-_SIEBEL_INBOUND	CS Fund Update - Siebel Inbound	Business Service Display Name for CS Fund Inbound WS

PickList

New?	Name	Description	Comments
Modified	PickList CPG Fund	Search Spec = [Fund Type] = LookupValue("CS_FUND_CODE","Account Fund") AND [Status] = LookupValue("CS_FUNDGROUP_STATUS","Completed")	Modified searchspec to include condition of Completed Status Funds.

Business Component

Name: CS Account Fund (Modified)

CS Account Fund Fields

New?	Name	Description	Comments
New	Calc Today	Type = DTYPE_DATE, Calculated = Y, Calculated value = Today ()	None
New	Fund Period Read Only Field	Type = DTYPE_BOOL, Calculated = Y, Calculated value = IIf([Calc Today] >= [Mdf Start Date], "Y", "N")	Used in making the Start and End Dates read-only after reaching the Start Date
New	No Delete Flag	Type = DTYPE_BOOL, Calculated = Y, Calculated value = IIf (([Mdf Alloc Total Estimate Pending Amount] > 0) OR ([Mdf Alloc Total Estimate Committed Amount] > 0) OR ([Status] = LookupValue ("CS_FUNDGROUP_STATUS","Completed")), "Y", "N")	Used in for disabling the Delete button, after the deal has been created for the fund. **NOTE:** This is applicable to "CS Account Fund" BC Only.
New	Fund Basis Date Field	Type = DTYPE_BOOL, Calculated = Y, Calculated value = IIf([Calc Today] >= [Basis Start Date], "Y", "N")	Used in Products code to determine the Basis Start Date value
Modified	Mdf Start Date	Validation: <= [Mdf End Date]	New validation
Modified	Mdf End Date	Validation: >= [Mdf Start Date]	New validation
Modified	Basis Start Date	Validation: <= [Basis End Date]	New validation
Modified	Basis End Date	Validation: >= [Basis Start Date]	New validation
Modified	Amount	Validation: >= 0	New validation
Modified	Status	Added Picklist = PickList CS Fund Group Status, Predefault Value = Expr: 'LookupValue("CS_FUNDGROUP_STATUS","In Progress")'	None
New	Read Only Condition Field	Type = DTYPE_BOOL, Calculated = Y, Calculated value = IIf([Status] = LookupValue("CS_FUNDGROUP_STATUS","Completed"), "Y", "N")	New field used for making some other fields read-only based on its value

BC User Properties

New?	Name	Value
New	No Update Condition Field	Read Only Condition Field
New	No Update Fields	Basis Start Date, Basis Period, Mdf Start Date, Period, Amount, Status.
New	NoDelete Field	No Delete Flag

Name: CS Child Account Fund (Modified)

CS Child Account Fund Fields

New?	Name	Description	Comments
New	Fund Period Read Only Field	Type = DTYPE_BOOL, Calculated = Y, Calculated value = IIf([Status] = LookupValue ("CS_FUNDGROUP_STATUS","Completed"), "Y", "N")	Used in making some other fields read-only based on its value
Modified	Amount	Validation: >= 0	New validation
New	Status	Column = STATUS_CD, Picklist = PickList CS Fund Group Status, Predefault Value = Expr: 'LookupValue("CS_FUNDGROUP_STATUS","In Progress")'	None

BC User Properties

New?	Name	Value
New	No Update Condition Field	Fund Period Read Only Field
New	No Update Fields	Account, Name, Amount, Status,
New	NoDelete Field	Fund Period Read Only Field
New	Generate Event On Parent BC	Y

Name: CS Fund Group (Modified)

CS Fund Group Fields

New?	Name	Description	Comments
New	Calc Today	Type = DTYPE_DATE, Calculated = Y, Calculated value = Today ()	None
New	Fund Period Read Only Field	Type = DTYPE_BOOL, Calculated = Y, Calculated value = IIf([Calc Today] >= [Mdf Start Date], "Y", "N")	Used in making the Start and End Dates read-only after reaching the Start Date
New	Fund Basis Date Field	Type = DTYPE_BOOL, Calculated = Y, Calculated value = IIf([Calc Today] >= [Basis Start Date], "Y", "N")	Used in Generate Account Funds code to determine the Basis Start Date value
Modified	Mdf Start Date	Validation: <= [Mdf End Date]	New validation
Modified	Mdf End Date	Validation: >= [Mdf Start Date]	New validation
Modified	Basis Start Date	Validation: <= [Basis End Date]	New validation
Modified	Basis End Date	Validation: >= [Basis Start Date]	New validation
Modified	Amount	Validation: >= 0	New validation

BC User Properties

New?	Name	Value
New	GenerateCurrent StartDate	N

Name: CS Fund Source Product

CS Fund Source Product Fields

New?	Name	Description	Comments
Modified	Accrual Start Date	Validation:<= [Accrual End Date]	New validation
Modified	Accrual End Date	Validation:>= [Accrual Start Date]	New validation
New	Calc Today	Type = DTYPE_DATE, Calculated = Y, Calculated value = Today()	Used in comparing the Start Date with current date for sending data to Oracle Trade Management.
New	Period Read Only Field	Type = DTYPE_BOOL, Calculated = Y, Calculated value = [Calc Today] >= [Fund MDF Start Date], Predefault value = N	Used in making the Basis Start and End Dates read-only after reaching the Basis Start Date
New	Fund MDF Start Date	Join = S_MDF, Column = MDF_START_DT, Type = DTYPE_DATE	Parent MDF start date
New	Fund Basis Start Date	Join = S_MDF, Column = BASIS_START_DT, Type = DTYPE_DATE	Parent Basis start date
New	Fund Basis Date Field	Type = DTYPE_BOOL, Calculated = Y, Calculated value = IIf([Calc Today] >= [Fund Basis Start Date], "Y", "N")	Used in the Product code
New	Fund Type	Join = S_MDF, Column = FUND_CD, Type = DTYPE_TEXT	Parent Fund Type
New	Is Account Fund	Type = DTYPE_BOOL, Calculated = Y, Calculated value = If ([Fund Type] = LookupValue("CS_FUND_CODE", "Account Fund"), "Y", "N")	Used in Runtime event condition
New	Source Product Id	Type = DTYPE_ID, Calculated = Y, Calculated value = [Id]	Needed by Integration object
New	Fund Status	Join = S_MDF, Column = STATUS_CD	Parent Fund Status

New?	Name	Description	Comments
New	Read Only Condition Field	Type = DTYPE_BOOL, Calculated = Y, Calculated value = IIf (ParentBCName() = 'CS Account Fund', IIf([Fund Status] = LookupValue ("CS_FUNDGROUP_STATUS","Completed"), "Y", "N"), "N")	None
New	Integration Data Update Flag	Column = DIST_FLG	Used in BPEL processes to force incoming update if values are the same

BC User Properties

New?	Name	Value
New	GenerateCurrentStartDate	N
New	Cumulative Accrual Data	Y
New	Generate Event On Parent BC	Y
New	No Update Condition Field	Period Read Only Field
New	No Update Fields	Accrual Start Date, Period,
New	NoDelete Field	Read Only Condition Field

Name: CPG Fund

CPG Fund Fields

New?	Name	Description	Comments
New	Status	Column = STATUS_CD, Picklist = PickList CS Fund Group Status, Link Specification = Y	Used in the PickList CPG Fund search spec

Applet

Name: CS Fund Source Product Admin List Applet

CS Fund Source Product Admin List Applet List Columns

New?	Name	Description	Comments
Modified	Shipment	Read Only = Y	Read only in UI because these values are coming from Oracle Trade Management.
Modified	Revenue	Read Only = Y	Read only in UI because these values are coming from Oracle Trade Management.

Name: CS Fund Admin List Applet

CS Fund Admin List Applet List Columns

New?	Name	Description	Comments
New	Status	Field = Status, Show in List = Y	New field exposed in UI for Account Funds

Map the List column in Edit List Applet Web Template Item.

Name: CS Fund Auto Admin List Applet

CS Fund Auto Admin List Applet List Columns

New?	Name	Description	Comments
New	Status	Field = Status, Show in List = Y, Read Only = Y	New field exposed in UI in Read only mode for Fund Group - Account Funds (bottom applet)

Map the List column in Edit List Applet Web Template Item.

Name: CS Fund Child Admin List Applet

CS Fund Child Admin List Applet

New?	Name	Description	Comments
New	Status	Field = Status, Show in List = Y	New field exposed in UI for Child Funds

Map the List column in Edit List Applet Web Template Item.

Name: CS Fund Summary Admin Form Applet

CS Fund Summary Admin Form Applet Controls

New?	Name	Description	Comments
New	Status	Field = Status	New field exposed in Account Funds form applet

Map the Column in Edit Applet Web Template Item.

Integration Object

- Name: Internal CSIntegSEBLSIAFundInterface (New)
- Project: CS CG Fund Integration
- Base Object Type: Siebel Business Object
- External Name: CS Fund
- XML Tag: ListOfCsintegseblsiafundinterface

Integration Components

- Name & External Name: CS Account Fund
- Parent Integration Component: None
- XML Container Element: None
- XML Tag: CsAccountFund

- Cardinality: Zero or One

Integration Component Fields

Name	Data Type	Length	Type	XML Style	XML Tag	Comments
Account	DTYPE_TEXT	40	Data	Element	Account	User Prop PICKLIST= Y
Account Id	DTYPE_ID		Data	Element	AccountId	None
Amount	DTYPE_CURRENCY		Data	Element	Amount	None
Basis	DTYPE_TEXT	30	Data	Element	Basis	User Prop PICKLIST= N
Currency Code	DTYPE_TEXT	20	Data	Element	CurrencyCode	User Prop PICKLIST= N
Exchange Date	DTYPE_DATE		Data	Element	ExchangeDate	None
Fund Type	DTYPE_TEXT	30	Data	Element	FundType	Query field for BC. We are supposed to send only Account Fund Type data.
Id	DTYPE_ID	30	System	Element	Id	None
Fund UId	DTYPE_ID		Data	Element	FundUId	None
Mdf End Date	DTYPE_DATE		Data	Element	MdfEndDate	None
Mdf Start Date	DTYPE_DATE		Data	Element	MdfStartDate	None
Mdf Type	DTYPE_TEXT	30	Data	Element	MdfType	User Prop PICKLIST= N
Name	DTYPE_TEXT	50	Data	Element	Name	
Organization	DTYPE_TEXT	50	Data	Element	Organization	User Prop PICKLIST= Y
Organization Id	DTYPE_ID		Data	Element	OrganizationId	None
Parent Fund Id	DTYPE_ID		Data	Element	ParentFundId	None

Name	Data Type	Length	Type	XML Style	XML Tag	Comments
Parent Fund Name	DTYPE_TEXT	50	Data	Element	ParentFundName	None
operation	DTYPE_TEXT		System	Attribute	operation	None
searchspec	DTYPE_TEXT		System	Attribute	searchspec	None

Integration Component Key

Key Name	Key Type	Sequence	Sequential Key Fields	Comments
User Key:1	User Key	1	Id	None
Status Key	Status Key	2	1 Operation 2 Id	None

- Name & External Name: CS Fund Source Product
- Parent Integration Component: CS Account Fund
- XML Container Element: ListOfCsFundSourceProduct
- XML Tag: CsFundSourceProduct

- Cardinality: Zero or More

Integration Component Fields

Name	Data Type	Length	Type	XML Style	XML Tag	Comments
Account Id	DTYPE_ID		Data	Element	AccountId	None
Accrual End Date	DTYPE_DATE		Data	Element	AccrualEndDate	None
Accrual Rate	DTYPE_CURRENCY		Data	Element	AccrualRate	None
Accrual Rate Percentage	DTYPE_NUMBER		Data	Element	AccrualRatePercentage	None
Accrual Start Date	DTYPE_DATE		Data	Element	AccrualStartDate	None
Currency Code	DTYPE_TEXT	20	Data	Element	CurrencyCode	None
Exchange Date	DTYPE_DATE		Data	Element	ExchangeDate	None
Fund Id	DTYPE_ID		Data	Element	FundId	None
Id	DTYPE_ID	30	System	Element	Id	None
Product Id	DTYPE_ID		Data	Element	ProductId	None
Product Name	DTYPE_TEXT	100	Data	Element	ProductName	None
Revenue	DTYPE_CURRENCY		Data	Element	Revenue	None
Shipments	DTYPE_INTEGER		Data	Element	Shipments2	None
Source Product Id	DTYPE_ID		Data	Element	SourceProductId	None
Integration DataUpdate Flag (Req)	DTYPE_TEXT	1	Data	Element	IntegrationDataUpdateFlag	None
Operation	DTYPE_TEXT	30	System	Attribute	operation	None
searchspec	DTYPE_TEXT	250	System	Attribute	searchspec	None

Integration Component Key

Key Name	Key Type	Sequence	Sequential Key Fields	Comments
V77 Wizard-Generated User Key:1	User Key	1	Id	None
Status Key	Status Key	2	1 Operation 2 Id	None

Integration Object User Prop

Name	Value	Comments
AllLangIndependentVals	Y	For each LOV Field, the internal integration object returns a LIC, if the user property AllLangIndependentVals is set to Y at the object level.
XMLTagNamespace	http://www.siebel.com/xml/CSIntegSEBLSIAFundInterface	None
XSDTypeNamespace	http://www.siebel.com/xml/CSIntegSEBLSIAFundInterface	None

- Name: CSIntegSEBLSIAFundInterface (New)
- Project: CG Funds Integration
- Base Object Type: XML
- External Name: CS Fund Interface
- XML Tag: ListOfCsintegseblsiafundinterface
- Description: This interface integration object is the pair of "Internal CSIntegSEBLSIAFundInterface", so it has all the Integration Components, which are in Internal CSIntegSEBLSIAFundInterface.

The following additional new Integration Object components are added to this XML based CSIntegSEBLSIAFundInterface integration object:

- Name & External Name: faultMessage
- Parent Integration Component: CS Account Fund
- XML Container Element: XML Tag: faultMessage

- Cardinality: Zero or One

  Integration Component Fields

Name	Data Type	Length	Type	External Name	External Data Type	External Length	XML Style	XML Tag
faultText	DTYPE_TEXT	20,240	Data	faultText	DTYPE_TEXT	20,240	Element	faultText
FlowContext	DTYPE_TEXT	512	Data	flowContext	DTYPE_TEXT	512	Element	flowContext
flowName	DTYPE_TEXT	128	Data	flowName	DTYPE_TEXT	128	Element	flowName
Lang	DTYPE_TEXT	20	Data	lang	DTYPE_TEXT	20	Element	lang
processCallStack	DTYPE_TEXT	1,024	Data	processCallStack	DTYPE_TEXT	1,024	Element	processCallStack
ProcessName	DTYPE_TEXT	128	Data	processName	DTYPE_TEXT	128	Element	processName
severity	DTYPE_INTEGER	1	Data	severity	DTYPE_INTEGER	1	Element	severity
Type	DTYPE_TEXT	128	Data	type	DTYPE_TEXT	128	Element	type

- Name & External Name: errorMessage
- Parent Integration Component: faultMessage
- XML Container Element: ListOfErrorMessage
- XML Tag: errorMessage

- Cardinality: Zero or more

Integration Component Fields

Name	Data Type	Length	Type	External Name	External Data Type	External Length	XML Style	XML Tag
AppInstance	DTYPE_TEXT	30	Data	appInstance	DTYPE_TEXT	30	Element	appInstance
appType	DTYPE_TEXT	30	Data	appType	DTYPE_TEXT	30	Element	appType
argument1	DTYPE_TEXT	512	Data	argument1	DTYPE_TEXT	512	Element	argument1
argument2	DTYPE_TEXT	512	Data	argument2	DTYPE_TEXT	512	Element	argument2
argument3	DTYPE_TEXT	512	Data	argument3	DTYPE_TEXT	512	Element	argument3
argument4	DTYPE_TEXT	512	Data	argument4	DTYPE_TEXT	512	Element	argument4
argument5	DTYPE_TEXT	512	Data	argument5	DTYPE_TEXT	512	Element	argument5
argument6	DTYPE_TEXT	512	Data	argument6	DTYPE_TEXT	512	Element	argument6
argument7	DTYPE_TEXT	512	Data	argument7	DTYPE_TEXT	512	Element	argument7
argument8	DTYPE_TEXT	512	Data	argument7	DTYPE_TEXT	512	Element	argument7
argument9	DTYPE_TEXT	512	Data	argument9	DTYPE_TEXT	512	Element	argument9
Code	DTYPE_TEXT	30	Data	code	DTYPE_TEXT	30	Element	code
Lang	DTYPE_TEXT	30	Data	lang	DTYPE_TEXT	30	Element	lang
Text	DTYPE_TEXT	20,240	Data	text	DTYPE_TEXT	20,240	Element	text

Integration Object User Prop

Name	Value	Comments
AllLangIndependentVals	N	None
XMLTagNamespace	http://www.siebel.com/xml/CSIntegSEBLSIAFundInterface	None
XSDTypeNamespace	http://www.siebel.com/xml/CSIntegSEBLSIAFundInterface	None

Business Service

- Name & Display Name: CSIntegSEBLSIACGFundUpdate (New)
- Class: CSSEAIDataSyncService
- External Use: Y
- State Management Type: Stateful

Business Service Methods

Name	Display Name
Delete	Delete
Insert	Insert
InsertOrUpdate	Insert or Update
Synchronize	Synchronize
Update	Update

Business Service Method Arguments

Name	Data Type	Integration Object	Type	Optional	Storage Type	Display Name	Comments
Siebel Message	Integration Object	CSIntegSEBLSIAFundInterface	Input / Output	N	Hierarchy		None
Status Object	String		Input	Y	Property		Pick Field = Id PickList = EAI Boolean Message Property PickList

- Name: QueryByExample

- Display Name: Query by Example

  Business Service Method Arguments

Name	Data Type	Integration Object	Type	Optional	Storage Type	Display Name	Comments
SiebelMessage	Integration Object	CSIntegSEBLSIAFundInterface	Input / Output	N	Hierarchy		None

- Name: QueryById
- Display Name: Query by ID

  Business Service Method Arguments

Name	Data Type	Integration Object	Type	Optional	Storage Type	Display Name	Comments
PrimaryRowId	String		Input	N	Property		None
Siebel Message	Integration Object	CSIntegSEBLSIAFundInterface	Output	N	Hierarchy		None

  Business Service User Prop

Name	Value
Application Services Interface	Y
Internal Integration Object	Internal CSIntegSEBLSIAFundInterface

- Name & Display Name: CRMIntegUpsertFundSEBL80ToEBS11i10Sync (New)
- Class: CSSWSOutboundDispatcher
- External Use: Y
- State Management Type: Stateful

Business Service Methods

- Name: process

- Display Name: process

  Business Service Method Arguments

Name	Data Type	Integration Object	Type	Optional	Storage Type	Display Name	BS Method Arg User Prop
CRMIntegUpsertFundSEBL80ToEBS11i10SyncRequestMessage:payload	Integration Object	CSIntegSEBLSIAFundInterface	Input	Y	Hierarchy	payload	WSDLPartName = payload XMLElementName = ListOfCsintegseblsiafundinterface XMLElementNamespace = http://www.siebel.com/xml/CSIntegSEBLSIAFundInterface
CRMIntegUpsertFundSEBL80ToEBS11i10SyncResponseMessage:payload	Integration Object	CSIntegSEBLSIAFundFaultMessage	Output	Y	Hierarchy	payload	WSDLPartName = payload XMLElementName = ListOfCsintegseblsiafundinterface XMLElementNamespace = http://www.siebel.com/xml/CSIntegSEBLSIAFundInterface
CustomHeaderContext	Hierarchy		Input/Output	Y	Hierarchy		
XMLHierarchyOutput	Hierarchy		Output	Y		XMLHierarchyOutput	

Name	Data Type	Integration Object	Type	Optional	Storage Type	Display Name	BS Method Arg User Prop
faultactor	String		Output	Y	Property		
faultcode	String		Output	Y	Property		
faultstring	String		Output	Y	Property		

3 Shut down the Siebel server and compile the locked projects into the server .srf file.

Workflow Deployment

To deploy workflows

1 Log in to Siebel Tools and navigate to Workflows.

2 Right click and select the Import Workflow process.

3 Enter CSIntegSEBLSIAFundUpsertOutboundFlow as the workflow to import.

4 Select the Project as CS CG Fund Integration and click OK.

5 Query for the workflow. The workflow should be created as follows:

- Workflow Process Name: CSIntegSEBLSIAFundUpsertOutboundFlow

- Workflow Mode: Service Flow

WF Process Properties

Name	In/Out	Business Object	Data Type	Access Mode
BinaryMSG	In/Out	CS Fund	String	RW
Error Code	In/Out	CS Fund	String	RW
Error Message	In/Out	CS Fund	String	RW
Fault Message	In/Out	CS Fund	Hierarchy	RW
IsError	In/Out	CS Fund	String	RW
Object Id	In/Out	CS Fund	String	RW
Process Instance Id	In/Out	CS Fund	String	RW
Siebel Outbound Message	In/Out	CS Fund	Hierarchy	RW
Siebel Operation Object Id	In/Out	CS Fund	String	RW

WF Steps

#	Name	Type	BS Name	BS Method	Input Argument	Output Argument
1	Start	Start				
2	Query Account Fund	Business Service	CSIntegSEBLSIACGFundUpdate	QueryById	PrimaryRowId	SiebelMessage
3	Send Account Fund	Business Service	CRMIntegUpsertFundSEBL80ToEBS11i10Sync	process	CSIntegSEBLSIAFundSyncRequestMessage:payload	faultMessage
4	Check Errors	Business Service	Genesis Error Handler	CheckForErrors	SiebelMessage	IsError
5	Error?	Decision Point				
6	Translate Errors	Business Service	Genesis Error Handler	TranslateErrors	SiebelMessage	OutputErrorMessages
7	Display Errors	Business Service	Genesis Error Handler	DisplayErrors	ErrorMessages	

6 Deploy the workflow by clicking Publish/Activate on WF/Task Editor Toolbar.

The toolbar can be enabled by selecting View > Toolbars > WF/Task Editor Toolbar.

7 Login to Siebel UI and navigate to Administration > Business Processes > Workflow Deployment.

8 Query for the Workflow deployed and click Activate.

Web Service Deployment

To deploy Web Services

1 Login to Siebel UI and navigate to Administration > Web Services > Inbound Web Services.

2 Click Import and specify the Web Service CSIntegSEBLSIACGFundUpdate.xml to be imported:

Inbound Web Service: CSIntegSEBLSIACGFundUpdate

3 After the inbound Web Service is imported, verify the Siebel server name address in the Service Ports applet.

The server address should be the one that the client should connect to. If required, change the address and provide a valid username and password.

Name: CSIntegSEBLSIACGFundUpdate (New)

Service Port

Name	Type	Business Service / Process	Transport	Address	Binding
CSIntegSEBLSIACGFundUpdate	Business Service	CS Fund Update - Siebel Inbound	HTTP	http://<webserver>/eai_<lang>/start.swe?SWEExtSource=WebService&SWEExtCmd=Execute&UserName=<UserName>&Password=<Password>	SOAP_RPC_LITERAL

Operations

Name	Method Display Name	Authentication Type
SiebelFundDelete	Delete	None
SiebelFundInsert	Insert	None
SiebelFundInsertOrUpdate	Insert or Update	None
SiebelFundQueryByExample	Query by Example	None
SiebelFundQueryById	Query by ID	None

Name	Method Display Name	Authentication Type
SiebelFundSynchronize	Synchronize	None
SiebelFundUpdate	Update	None

4 Click Clear Cache.

5 Navigate to Administration > Web Services > Outbound Web Services.

6 Click Import and specify the Web Service CRMIntegUpsertFundSEBL80ToEBS11i10Sync.xml to be imported:

Outbound Web Service: CRMIntegUpsertFundSEBL80ToEBS11i10Sync.xml

7 After the outbound Web Service is imported, verify the BPEL server name in the Service Ports applet.

The server name should be the one that the client should connect to. If required, change the address and save.

Outbound Web Service is created as follows:

- Name: CRMIntegUpsertFundSEBL80ToEBS11i10Sync (New)
- Namespace: http://xmlns.oracle.com/CRMIntegUpsertFundSEBL80ToEBS11i10Sync

Service Port

Name	Service Display Name	Transport	Address	Binding
CRMIntegUpsertFundSEBL80ToEBS11i10SyncPort	CS Fund Create - Siebel Outbound	HTTP	http://<host-info>/orabpel/default/CRMIntegUpsertFundSEBL80ToEBS11i10Sync/1.0	SOAP_DOC_LITERAL

Operations

- Method Display Name: Process
- Authentication Type: None

8 Click Clear Cache.

Runtime events

To manage runtime events

1 Navigate to Administration Runtime Events > Action Sets.

2 Create a new Action Set as follows:

Action Set

Name: CS Account Fund Update

Name	Action Type	Business Service Name	Business Service Method	Business Service Context
Fund Source Product Create	BusService	Workflow Process Manager	RunProcess	"ProcessName", "CSIntegSEBLSIAFundUpsertOutboundFlow"

Events

3 Navigate to Administration Runtime Events > Events.

4 Create new events as follows:

Sequence	Object Name	Object Name	Event	Conditional Expression
1	BusComp	CS Account Fund	NewRecord	[Read Only Condition Field] = 'Y'
2	BusComp	CS Account Fund	WriteRecord	[Read Only Condition Field] = 'Y'
3	BusComp	CS Fund Source Product	NewRecord	([Is Account Fund] = 'Y' AND [Read Only Condition Field] = 'Y')
4	BusComp	CS Fund Source Product	WriteRecord	([Is Account Fund] = 'Y' AND [Read Only Condition Field] = 'Y')

5 Choose the Load Runtime Events menu option.

Setting Up Deductions

Repository Changes for Deduction

To import the Siebel Artifacts

1 Log in to Siebel 8.0 Tools and create a new project CS CG Deduction Interface and lock the following existing projects:

- CS CG Promotion Planning
- CS CG Deduction Mgmt II

- CPG Account Fund
- CS CG Deduction Management
- CS CG MDF Planning
- CS CG Deduction (SCW)
- CS CG Deduction2 (SCW)
- Symbolic Strings

2 Import the following .sif files from the Siebel Quick Fix build, which contains new and modified repository objects:

- ACR358_GenesisErrorHandler.sif
- ACR358_Deductions.sif

The followings are the repository changes included in ACR358_Deductions.sif.

Project: New

Name: CS CG Deduction Interface

Symbolic Strings

Name	Current Display Value	Definition
SBL_CS_DEDUCTION_PAYMENT_INBOUND	Deduction and Payment - Siebel Inbound	Deduction and Payment Inbound Web Service display name
SBL_CS_RESOLUTION_PAYMENT_INBOUND	Resolution and Payment - Siebel Inbound	Resolution and Payment Inbound Web Service display name
SBL_CS_RESOLUTION_PAYMENT_OUTBOUND	Resolution and Payment - Siebel Outbound	Resolution and Payment - Siebel Outbound

Business Components

- CG MDF Promotion Allocation - Pick (Modified)

  Add new field "Promotion Status" which maps to Column STATUS_CD by Join "Fund Promotion".

- CG Split Deduction (Modified)
  - Add MVL: CPG Deduction Child Payments using Link CG Split Deduction/CPG Deduction Child Payments:

    No Copy = Y
  - Add new calculated fields:
    - Field: Count Resolution Record

    Calculated Value: IfNull(Count("CPG Deduction Child Payments"), 0)

- Field: Deduction Amount Read Only Flag

  Calculated Value: IIf (ParentFieldValue("Sum Resolution Record Count") > 0 or

  [Payment Status] = LookupValue("DEDUCTION_STATUS","Inactive"), "Y", "N")

- CPG Account Credit Memo (Modified)
  - Add new Business Component User Property:
    - Name: CG Auto Submit On WriteRecord

      Value: Y
    - Name: Named Method 1

      Value: "SubmitPayment", "INVOKESVC", "CPG Account Credit Memo", "Workflow Process Manager", "RunProcess", "'ProcessName'", "CSIntegSEBLSIAPaymentInsertOuboundFlow", "'RowId'", "[Id]"
    - Name: On Field Update Invoke 1

      Value: "Payment Status", "CPG Account Credit Memo", "SubmitPayment", "[Payment Status]=LookupValue('FUNDRQ_STATUS', 'Submitted')"
- CPG Check Payment (Modified)
  - Add new Fields:
    - Field: Account Id

      Column: ACCNT_ID
    - Field: Integration Id

      Column:INTEGRATION_ID

      Predefault Value:Field: 'Id'
  - Modify an existing field:
    - Field: Allocation Id

      Change PickList to "CPG Checkbook Payment Allocation PickList"
  - Add a new Business Component User Property:
    - Name: On Field Update Invoke 1

      Value: "Payment Status", "CPG Check Payment", "SubmitPayment", "[Payment Status]=LookupValue('FUNDRQ_STATUS', 'Submitted')"
    - Name: On Field Update Invoke 5

      Value: "Payment Status", "CPG Check Payment", "SaveRecord", "[Payment Status]=LookupValue('FUNDRQ_STATUS', 'Submitted')"
    - Name: Named Method 1

      Value: "SubmitPayment", "INVOKESVC", " CPG Check Payment", "Workflow Process Manager", "RunProcess", "'ProcessName'", "CSIntegSEBLSIAPaymentInsertOuboundFlow", "'RowId'", "[Id]"

- Name: Named Method 2

  Value: "SaveRecord", "INVOKE", "CPG Check Payment", "WriteRecord"

- CPG Deduction (Modified)
  - Add new Fields:
    - Field: Integration Id

      Column:INTEGRATION_ID

      Predefault Value:Field: 'Id'
- CPG Deduction (Modified)
  - Add new Fields:
    - Field: Integration Id

      Column:INTEGRATION_ID

      Predefault Value:Field: 'Id'
  - Modify existing Fields:
    - Field: Chargeback Amount

      Validation: >= 0
    - Field: Credit Memo Amount

      Validation: >= 0
    - Field: Total Resolved Amount

      Validation: >= 0
    - Field: Trade Funds Amount

      Validation: >= 0
  - Modify existing MVL: "CPG Resolution Payments" set "No Copy" = Y.
- CPG Deduction Admin (Modified)
  - Modify MVL: "CPG Resolution Payments" set "No Copy" = Y.
  - Add MVL: CG Split Deduction using Link CS CG Deduction and Payment/CG Split Deduction.
  - Add new MVFs:
    - Field: Child Deduction Amount

      Destination Field: Deduction Amount

      Multivalue Link: CG Split Deduction
    - Field: Child Resolution Record Count

      Destination Field: Count Resolution Record

      Multivalue Link: CG Split Deduction

- Add new calculated fields:
  - Field: Sum Child Deduction Amount

    Calculated Value: Sum ([Child Deduction Amount])
  - Field: Sum Resolution Record Count

    Calculated Value: IfNull(Sum ([Child Resolution Record Count]), 0)

- CPG Deduction Chargeback (Modified)
  - Add new calculated field:
    - Name: CG Auto Paid OnSubmit Flag

      Calculated value: Y
  - Add new Business Component User Property:
    - Name: On Field Update Invoke 1

      Value: "Payment Status", "CPG Deduction Chargeback", "SubmitPayment", "[Payment Status]=LookupValue('FUNDRQ_STATUS', 'Submitted')"
    - Name: On Field Update Invoke 2

      Value: "Payment Status", "CPG Deduction Chargeback", "SaveRecord", "[Payment Status]=LookupValue('FUNDRQ_STATUS', 'Submitted')"
    - Name: Named Method 1

      Value: "SubmitPayment", "INVOKESVC", "CPG Deduction Chargeback", "Workflow Process Manager", "RunProcess", "'ProcessName'", "CSIntegSEBLSIAPaymentInsertOuboundFlow", "'RowId'", "[Id]"
    - Name: Named Method 2

      Value: "SaveRecord", "INVOKE", "CPG Deduction Chargeback", "WriteRecord"
    - Name: CG Auto Paid OnSubmit

      Value: CG Auto Paid OnSubmit Flag

- CPG Deduction Resolution - Payment (Modified)
  - Add new calculated field:
    - Name: CG Auto Paid OnSubmit Flag

      Calculated value: IIf ([Payment Credit Num] is not null, "Y", "N")
  - Add a new Business Component User Property:
    - Name: On Field Update Invoke 1

      Value: "Payment Status", "CPG Deduction Resolution - Payment", "SubmitPayment", "[Payment Status]=LookupValue('FUNDRQ_STATUS', 'Submitted')"

- Name: On Field Update Invoke 2

  Value: "Payment Status", "CPG Deduction Resolution - Payment", "SaveRecord", "[Payment Status]=LookupValue('FUNDRQ_STATUS', 'Submitted')"

- Name: Named Method 1

  Value: "SubmitPayment", "INVOKESVC", "CPG Deduction Resolution - Payment", "Workflow Process Manager", "RunProcess", "'ProcessName'", "CSIntegSEBLSIAPaymentInsertOuboundFlow", "'RowId'", "[Id]"

- Name: Named Method 2

  Value: "SaveRecord", "INVOKE", "CPG Deduction Resolution - Payment", "WriteRecord"

- Name: CG Auto Paid OnSubmit

  Value: CG Auto Paid OnSubmit Flag

- CPG Deduction Write-Off (Modified)
  - Add new calculated field:
    - Name: CG Auto Paid OnSubmit Flag

      Calculated value: Y
  - Add a new Business Component User Property:
    - Name: On Field Update Invoke 1

      Value: "Payment Status", "CPG Deduction Write-Off", "SubmitPayment", "[Payment Status]=LookupValue('FUNDRQ_STATUS', 'Submitted')"

    - Name: On Field Update Invoke 2

      Value: "Payment Status", "CPG Deduction Write-Off", "SaveRecord", "[Payment Status]=LookupValue('FUNDRQ_STATUS', 'Submitted')"

    - Name: Named Method 1

      Value: "SubmitPayment", "INVOKESVC", "CPG Deduction Write-Off", "Workflow Process Manager", "RunProcess", "'ProcessName'", "CSIntegSEBLSIAPaymentInsertOuboundFlow", "'RowId'", "[Id]"

    - Name: Named Method 2

      Value: "SaveRecord", "INVOKE", "CPG Deduction Write-Off", "WriteRecord"

    - Name: CG Auto Paid OnSubmit

      Value: CG Auto Paid OnSubmit Flag

- CPG Mdf Checkbook (Modified)
  - Add new Fields:
    - Field: Payments Pending

      Column:CG_PENDING_AMT

- Field: Payments Sub

  Column:CG_SUBMITED_AMT

- Field: Payments Paid

  Column:CG_PAID_AMT

- Modify existing calculated field:

  - Field: Payment Lock Flag

    Change calculated value:

    IIf ([Payment Status] = LookupValue("FUNDRQ_STATUS","Submitted") or [Payment Status] = LookupValue("FUNDRQ_STATUS","Paid") or [V/C Flag] = 'Y' or [Payments Sub] > 0.00 or [Payments Paid] >0.00, "Y", "N")

- CS CG Deduction and Payment (New)
  - Clone CPG Dedcution Bussiness Component.
  - Make the following changes:
    - Remove Search Specification.
    - Set Buscomp View Mode "Sales Rep" Inactive = Y.
    - Business Component User Property:
      Add a new User Property:
      Name: Is Integration BC
      Value: Y

      Inactivate the existing User Properties: Name: Deep Copy, Deep Copy 1, Deep Copy 2, Deep Copy 3, Deep Copy 4, Rollup Fields 1 and User Position Visibility.
    - Remove existing User Property: On Field Update Set.

      Join
      Inactive Join "S_SRC_PAY_ATT".

      Modify the existing fields:
      Account:Set Required = N
      Account Id:Set Required=Y, Set Read Only = N, PickList = PickList CPG Account
      Payment Status:PickList = PickList Deduction and Payment Status
      Attachment: Inactive = Y
      Attachment Name: Inactive = Y
      Chargeback Amount
      Validation:>= 0
      Credit Memo Amount
      Validation:>= 0
      Total Resolved Amount
      Validation:>= 0
      Trade Funds Amount
      Validation:>= 0

- Add new single value fields:
  Deduction Amount Read Only Flag:
  Calculated value = IIf ([Source Payment Type] <>
  LookupValue("PAYMENT_METHOD_CODE","Deduction") OR [Count Resolution Record] > 0 OR [Sum Split Ded Resolution Record]> 0, "Y", "N")
  Deduction Status Read Only Flag: Calculated value = [Deduction Amount Read Only Flag]
  Integration Id:No Copy = N
  Count Child Deduction:Calculated value = IfNull(Count("CG Split Deduction"), 0)
  Count Resolution Record:Calculated value = IfNull(Count("CPG Deduction Child Payments"), 0)
  Sum Split Ded Resolution Record:Calculated value = IfNull(Sum ([Count Split Ded Resolution Record]), 0)
- Add new MLV Field:
  Count Split Ded Resolution Record:Destination field = Count Resolution Record by MVL "CG Split Deduction"
- Add MVLs:
  CG Split Deduction:CS CG Deduction and Payment/CG Split Deduction
  CPG Deduction Child Payments:CS CG Deduction and Payment/CPG Deduction Child Payments

- CS CG Resolution and Payment (New)
  - Class: CSSBCCSBase
  - Search Specification: [Payment Reason Type] = LookupValue("PAYMENT_TYPE_CODE","Deduction") or [Resolution Type] = LookupValue("PAYMENT_TYPE_CODE","Chargeback") or [Resolution Type] = LookupValue("PAYMENT_TYPE_CODE","Write Off") or [Account Credit Memo Payment Type] = LookupValue("PAYMENT_METHOD_CODE","Credit Memo")
  - Table: S_SRC_PAYMENT
  - Join:
    - Table: S_SRC_PAYMENT
    - Alias: Parent Payment
    - Out Join Flag: Y

Table 30. Fields

Name	Calculated Value	Join	Column	Type
Account Credit Memo Account Id			ACCNT_ID	DTYPE_ID
Account Credit Memo Amount			PAY_AMT	DTYPE_NUMBER
Account Credit Memo Date			PERFORM_DT	DTYPE_DATE

Table 30. Fields

Name	Calculated Value	Join	Column	Type
Account Credit Memo Payment Type			PAY_TYPE_CD	DTYPE_TEXT
Calc Account Id	IIf([Account Credit Memo Account Id] is not null, [Account Credit Memo Account Id], [Deduction or Checkbook Account Id])			DTYPE_ID
Calc Amount	IIf ([Account Credit Memo Payment Type] = LookupValue("PAYMENT_METHOD_CODE", "Credit Memo") AND [Account Credit Memo Amount] is not null, [Account Credit Memo Amount], [Calc Resolution Amount])			DTYPE_CURRENCY
Calc Deduction Date	IIf([Account Credit Memo Date] is not null, [Account Credit Memo Date], [Deduction Date])			DTYPE_TEXT
Calc Deduction Id	IIf([Parent Payment Type] = LookupValue('PAYMENT_METHOD_CODE', 'Deduction'), [Parent Payment Id], [Id])			DTYPE_ID
Calc Payment Method Type	IIf ([Account Credit Memo Payment Type] is not null, [Account Credit Memo Payment Type], IIf([Calc Resolution Type] is not null, [Calc Resolution Type], [Parent Payment Type]))			DTYPE_TEXT

Table 30. Fields

Name	Calculated Value	Join	Column	Type
Calc Resolution Amount	IIf ([Trade Funds Amount] is not null, [Trade Funds Amount], IIf([Credit Memo Amount] is not null, [Credit Memo Amount], IIf([Write-off Amount] is not null, [Write-off Amount], IIf([Chargeback Amount] is not null, [Chargeback Amount], 0.0))))			DTYPE_CURRENCY
Calc Resolution Type	IIf ([Resolution Type] = LookupValue('PAYMENT_TYPE_CODE','Chargeback') OR [Resolution Type] = LookupValue('PAYMENT_TYPE_CODE','Write Off'), [Resolution Type], "")			DTYPE_TEXT
Chargeback Amount			CHRG_BCK_AMT	DTYPE_CURRENCY
Credit Memo Amount			CG_CREDIT_MEMO_TOT	DTYPE_CURRENCY
Credit Memo Id			CG_CREDIT_MEMO_ID	DTYPE_ID
Currency Code			AMT_CURCY_CD	DTYPE_TEXT
Currency Exchange Date			AMT_DT	DTYPE_DATE
Deduction Amount		Parent Payment	REQUEST_AMT	DTYPE_CURRENCY
Deduction Date		Parent Payment	PERFORM_DT	DTYPE_DATE
Deduction Debit Memo Number		Parent Payment	PAYMENT_NUM	DTYPE_TEXT

Table 30. Fields

Name	Calculated Value	Join	Column	Type
Deduction Reason		Parent Payment	REASON_CD	DTYPE_TEXT
Deduction Status		Parent Payment	PAY_STAT_CD	DTYPE_TEXT
Deduction Type		Parent Payment	REASON_TYPE_CD	DTYPE_TEXT
Deduction or Checkbook Account Id		Parent Payment	ACCNT_ID	DTYPE_ID
Fund Allocation Id			CG_MDF_ALLOC_ID	DTYPE_ID
Parent Payment Id			PAR_PAYMENT_ID	DTYPE_ID
Parent Payment Type		Parent Payment	PAY_TYPE_CD	DTYPE_TEXT
Payment Id			ROW_ID	DTYPE_ID
Payment Reason Type			REASON_TYPE_CD	DTYPE_TEXT
Payment Status			PAY_STAT_CD	DTYPE_TEXT
Resolution Created Date			CREATED	DTYPE_UTCDATETIME
Resolution Type			TYPE_CD	DTYPE_TEXT
Root Deduction Id		Parent Payment	PAR_PAYMENT_ID	DTYPE_ID
Trade Funds Amount			CG_TRADE_FUND_TOT	DTYPE_CURRENCY
Write-off Amount			CG_GL_TOT	DTYPE_CURRENCY

Pick Lists

- CPG Checkbook Payment Allocation PickList (New)
  - Business Component: CG MDF Promotion Allocation - Pick

- Search Specification:[Promotion Status] = LookupValue("CAMPAIGN_STATE", "Finalized")

- CPG Deduction Allocation PickList (Modified)
  - Add Search Specification: [Promotion Status] = LookupValue("CAMPAIGN_STATE", "Finalized")
- PickList Deduction and Payment Status (New)
  - Business Component: PickList Generic
  - Search Specification:[Order By] = 201 or [Order By] = 203 or [Order By] = 401 or [Order By] = 402 or [Order By] = 403 or [Order By] = 204 or [Order By] = 207
  - Type Field:Type
  - Type Value: FUNDRQ_STATUS

Links

- CG Split Deduction/CPG Deduction Child Payments (New)
  - Parent Business Component:CG Split Deduction
  - Child Business Component:CPG Deduction Child Payments
  - Source Field: Id
  - Destination Field:Parent Payment Id
  - Search Specification:
    - [Payment Status] = LookupValue("FUNDRQ_STATUS","Submitted")

    or

    - [Payment Status] = LookupValue("FUNDRQ_STATUS","Paid")
- CS CG Deduction and Payment/CPG Deduction Child Payments (New)
  - Parent Business Component: CS CG Deduction and Payment
  - Child Business Component:CPG Deduction Child Payments
  - Source Field: Id
  - Destination Field: Parent Payment Id
  - Search Specification: [Payment Status] <> LookupValue("FUNDRQ_STATUS","Inactive")
- CS CG Deduction and Payment/CG Split Deduction (New)
  - Parent Business Component: CS CG Deduction and Payment
  - Child Business Component: CG Split Deduction
  - Source Field: Id
  - Destination Field: Parent Payment Id
  - Search Specification:

- [Payment Status] = LookupValue("FUNDRQ_STATUS","Submitted")

or

- Payment Status] = LookupValue("FUNDRQ_STATUS","Paid")

Business Objects

- CS CG Payment (New)
  - Primary Business Component: CS CG Resolution and Payment
  - Business Component:
    - CS CG Deduction and Payment
    - CS CG Resolution and Payment
    - CPG Check Payment

Integration Objects

- CSIntegSEBLSIADeductionInterface (New)
  - Base Object Type: XML
  - External Name: CS CG Payment
  - XML Tag: ListOfCsintegseblsiadeductioninterface
- Integration Component: CS CG Deduction and Payment

Table 31. Integration Component Field

Name	External Data Type	External Length	External Required	XML Style	XML Tag
Account	DTYPE_TEXT	100	N	Element	Account
Account Id	DTYPE_ID		Y	Element	AccountId
Currency Code	DTYPE_TEXT	20	N	Element	CurrencyCode
Currency Exchange Date	DTYPE_DATE		N	Element	CurrencyExchangeDate
Debit Memo Number	DTYPE_TEXT	30	N	Element	DebitMemoNumber
Deduction Amount	DTYPE_CURRENCY		Y	Element	DeductionAmount
Deduction Date	DTYPE_DATE		N	Element	DeductionDate
Deduction Reason Code	DTYPE_TEXT	30	N		DeductionReasonCode
Deduction Status Date	DTYPE_DATE		N	Element	DeductionStatusDate

Table 31. Integration Component Field

Name	External Data Type	External Length	External Required	XML Style	XML Tag
Id			N	Element	Id
Integration Id	DTYPE_ID		N	Element	IntegrationId
Parent Payment Id	DTYPE_ID		N	Element	ParentPaymentId
Payment Status	DTYPE_TEXT	30	N	Element	PaymentStatus
Payment Type	DTYPE_ID		N	Element	PaymentType
operation			N	Attribute	operation
searchspec			N	Attribute	searchspec

- Integration Component: Fault
  - Parent Integration Component: CS CG Deduction and Payment
  - Integration Component Field: faultText
- Integration Object User Prop:
  - Name: AllLangIndependentVals
  - Value: N
  - Name: XMLTagNamespace
  - Value: http://www.siebel.com/xml/CSIntegSEBLSIADeductionInterface
  - Name: XSDTypeNamespace
  - Value: http://www.siebel.com/xml/CSIntegSEBLSIADeductionInterface
- Internal CSIntegSEBLSIADeductionInterface (New)
  - Base Object Type: Siebel Business Object
  - External Name: CS CG Payment
  - XML Tag: ListOfCsintegseblsiadeductioninterface
- Integration Component: CS CG Deduction and Payment
  - Integration Component Field: Same as Integration Object CSIntegSEBLSIADeductionInterface
  - Integration Object User Prop:
    - Name: AllLangIndependentVals
    - Value: Y
    - Name: XMLTagNamespace

- Value: http://www.siebel.com/xml/CSIntegSEBLSIADeductionInterface
- Name: XSDTypeNamespace
- Value: http://www.siebel.com/xml/CSIntegSEBLSIADeductionInterface

- CSIntegSEBLSIAPaymentInterface (New)
  - Base Object Type: XML
  - External Name: CS CG Payment
  - XML Tag: ListOfCsintegseblsiapaymentinterface
- Integration Component: CS CG Resolution and Payment

Integration Component Fields

Table 32. Integration Component Fields

Name	External Data Type	External Length	External Required	XML Style	XML Tag
Account Credit Memo Account Id	DTYPE_ID		N	Element	AccountCreditMemo AccountId
Account Credit Memo Amount	DTYPE_NUMBER		N	Element	AccountCreditMemo Amount
Account Credit Memo Date	DTYPE_DATE		N	Element	AccountCreditMemo Date
Account Credit Memo Payment Type	DTYPE_TEXT	30	N	Element	AccountCreditMemo PaymentType
Calc Account Id	DTYPE_ID		N	Element	CalcAccountId
Calc Amount	DTYPE_CURRENCY		N	Element	CalcAmount
Calc Deduction Date	DTYPE_TEXT		N	Element	CalcDeductionDate
Calc Deduction Id	DTYPE_ID		N	Element	CalcDeductionId
Calc Payment Method Type	DTYPE_TEXT	30	N	Element	CalcPaymentMethodType
Calc Resolution Amount	DTYPE_CURRENCY		N	Element	CalcResolutionAmount
Calc Resolution Type	DTYPE_TEXT		N	Element	CalcResolutionType
Chargeback Amount	DTYPE_CURRENCY		N	Element	ChargebackAmount

Table 32. Integration Component Fields

Name	External Data Type	External Length	External Required	XML Style	XML Tag
Credit Memo Amount	DTYPE_CURRENCY		N	Element	CreditMemoAmount
Credit Memo Id	DTYPE_ID		N	Element	CreditMemoId
Currency Code	DTYPE_TEXT	20	N	Element	CurrencyCode
Currency Exchange Date	DTYPE_DATE		N	Element	CurrencyExchangeDate
Deduction Amount	DTYPE_CURRENCY		N	Element	DeductionAmount
Deduction Date	DTYPE_DATE		N	Element	DeductionDate
Deduction Debit Memo Number	DTYPE_TEXT	50	N	Element	DeductionDebitMemoNumber
Deduction Reason	DTYPE_TEXT	30	N	Element	DeductionReason
Deduction Status	DTYPE_TEXT	30	N	Element	DeductionStatus
Deduction Type	DTYPE_TEXT	30	N	Element	DeductionType
Deduction or Checkbook Account Id	DTYPE_ID		N	Element	DeductionorCheckbookAccountId
Fund Allocation Id	DTYPE_ID		N	Element	FundAllocationId
Id			N	Element	Id
Parent Payment Id	DTYPE_ID		N	Element	ParentPaymentId
Parent Payment Type	DTYPE_TEXT	30	N	Element	ParentPaymentType
Payment Id	DTYPE_ID		N	Element	PaymentId
Payment Reason Type	DTYPE_TEXT	30	N	Element	PaymentReasonType
Payment Status	DTYPE_TEXT	30	N	Element	PaymentStatus
Resolution Created Date	DTYPE_UTCDATETIME		N	Element	ResolutionCreatedDate

Table 32. Integration Component Fields

Name	External Data Type	External Length	External Required	XML Style	XML Tag
Resolution Type	DTYPE_TEXT	30	N	Element	ResolutionType
Root Deduction Id	DTYPE_ID		N	Element	RootDeductionId
Trade Funds Amount	DTYPE_CURRENCY		N	Element	TradeFundsAmount
Write-off Amount	DTYPE_CURRENCY		N	Element	Write-offAmount
operation			N	Attribute	operation
searchspec			N	Attribute	searchspec

- Integration Component: faultMessage
  - Parent Integration Component: CS CG Resolution and Payment

    Integration Component Fields

Table 33. Integration Component Field

Name	External Data Type	External Length	External Required	XML Style	XML Tag
faultText	DTYPE_TEXT	20,240	N	Element	faultText
flowContext	DTYPE_TEXT	512	N	Element	flowContext
flowName	DTYPE_TEXT	128	N	Element	flowName
lang	DTYPE_TEXT	20	N	Element	lang
processCallStack	DTYPE_TEXT	1,024	N	Element	processCallStack
processName	DTYPE_TEXT	128	N	Element	processName
severity	DTYPE_INTEGER	1	N	Element	severity
type	DTYPE_TEXT	128	N	Element	type

- Integration Component: errorMessage

- Parent Integration Component: faultMessage

  Integration Component Fields

Table 34. Integration Component Field

Name	External Data Type	External Length	External Required	XML Style	XML Tag
appInstance	DTYPE_TEXT	30	N	Element	appInstance
appType	DTYPE_TEXT	30	N	Element	appType
argument1	DTYPE_TEXT	512	N	Element	argument1
argument2	DTYPE_TEXT	512	N	Element	argument2
argument3	DTYPE_TEXT	512	N	Element	argument3
argument4	DTYPE_TEXT	512	N	Element	argument4
argument5	DTYPE_TEXT	512	N	Element	argument5
argument6	DTYPE_TEXT	512	N	Element	argument6
argument7	DTYPE_TEXT	512	N	Element	argument7
argument8	DTYPE_TEXT	512	N	Element	argument8
argument9	DTYPE_TEXT	512	N	Element	argument9
code	DTYPE_TEXT	30	N	Element	code
lang	DTYPE_TEXT	30	N	Element	lang
text	DTYPE_TEXT	20,240	N	Element	text

- Integration Object User Prop
  - Name: AllLangIndependentVals
  - Value: N
  - Name: XMLTagNamespace
  - Value: http://www.siebel.com/xml/CSIntegSEBLSIAPaymentInterface
  - Name: XSDTypeNamespace
  - Value http://www.siebel.com/xml/CSIntegSEBLSIAPaymentInterface
- Internal CSIntegSEBLSIAPaymentInterface (New)
  - Base Object Type: Siebel Business Object
  - External Name: CS CG Payment
  - XML Tag: ListOfCsintegseblsiapaymentinterface
- Integration Component: CS CG Resolution and Payment
  - Integration Component Field: Same as Integration Object CSIntegSEBLSIAPaymentInterface

- Integration Object User Prop:
  - Name: AllLangIndependentVals
  - Value: Y
  - Name: XMLTagNamespace
  - Value: http://www.siebel.com/xml/CSIntegSEBLSIAPaymentInterface
  - Name: XSDTypeNamespace
  - Value http://www.siebel.com/xml/CSIntegSEBLSIAPaymentInterface

Business Services

- CRMIntegUpsertDeductionSEBL80ToEBS11i10Sync (New)
  - Class:CSSWSOutboundDispatcher
  - Display Name String Reference: SBL_CS_RESOLUTION_PAYMENT_OUTBOUND
  - State Management Type: Stateful
- Business Server Method: process

Table 35. Business Service Method Arg

Name	Data Type	Integration Object	Type	Storage Type
CRMIntegUpsertDeductionSEBL80ToEBS11i10SyncRequestMessage:payload	Integration Object	CSIntegSEBLSIA PaymentInterface	Input	Hierarchy
CRMIntegUpsertDeductionSEBL80ToEBS11i10SyncResponseMessage:payload	Integration Object	CSIntegSEBLSIA PaymentInterface	Output	Hierarchy
CustomHeaderContext	Hierarchy		Input / Output	Hierarchy
XMLHierarchyOutput	Hierarchy		Output	Hierarchy
faultactor	String		Output	Property
faultcode	String		Output	Property
faultstring	String		Output	Property

- Business Service User Property
  - Name: siebel_port_name
  - Value: CRMIntegUpsertDeductionSEBL80ToEBS11i10SyncPort
  - Name: siebel_web_service_name
  - Value: CRMIntegUpsertDeductionSEBL80ToEBS11i10Sync

- Name: siebel_web_service_namespace
- Value: http://xmlns.oracle.com/CRMIntegUpsertDeductionSEBL80ToEBS11i10Sync

- CSIntegSEBLSIADeductionAndPayment (New)
  - Class:CSSEAIDataSyncService
  - Display Name String Reference: SBL_CS_DEDUCTION_PAYMENT_INBOUND
  - State Management Type: Stateful
- Business Server Method: Delete

Table 36. Business Service Method Arg

Name	Data Type	Integration Object	Type	Storage Type
SiebelMessage	Integration Object	CSIntegSEBLSIADeductionInterface	Input / Output	Hierarchy
StatusObject	String		Input	Property

- Business Server Method: Insert

Table 37. Business Service Method Arg

Name	Data Type	Integration Object	Type	Storage Type
SiebelMessage	Integration Object	CSIntegSEBLSIADeductionInterface	Input / Output	Hierarchy
StatusObject	String		Input	Property

- Business Server Method: InsertOrUpdate

Table 38. Business Service Method Arg

Name	Data Type	Integration Object	Type	Storage Type
SiebelMessage	Integration Object	CSIntegSEBLSIADeduction Interface	Input / Output	Hierarchy
StatusObject	String		Input	Property

- Business Server Method: QueryByExample

Table 39. Business Service Method Arg

Name	Data Type	Integration Object	Type	Storage Type
SiebelMessage	Integration Object	CSIntegSEBLSIADeductionInterface	Input / Output	Hierarchy

- Business Server Method: QueryById

Table 40. Business Service Method Arg

Name	Data Type	Integration Object	Type	Storage Type
PrimaryRowId	String		Input	Property
SiebelMessage	Integration Object	CSIntegSEBLSIADeductionInterface	Input / Output	Hierarchy

- Business Server Method: Synchronize

Table 41. Business Service Method Arg

Name	Data Type	Integration Object	Type	Storage Type
SiebelMessage	Integration Object	CSIntegSEBLSIADeductionInterface	Input / Output	Hierarchy
StatusObject	String		Input	Property

- Business Server Method: Update

Table 42. Business Service Method Arg

Name	Data Type	Integration Object	Type	Storage Type
SiebelMessage	Integration Object	CSIntegSEBLSIADeductionInterface	Input / Output	Hierarchy
StatusObject	String		Input	Property

- Business Service User Prop:
  - Name: Application Services Interface
  - Value: Y
  - Name: Internal Integration Object
  - Value: Internal CSIntegSEBLSIADeductionInterface
- CSIntegSEBLSIAResolutionAndPayment (New)
  - Class: CSSEAIDataSyncService
  - Display Name String Reference: SBL_CS_RESOLUTION_PAYMENT_INBOUND
  - State Management Type: Stateful
- Business Server Method: Delete

Table 43. Business Service Method Arg

Name	Data Type	Integration Object	Type	Storage Type
SiebelMessage	Integration Object	CSIntegSEBLSIA PaymentInterfac e	Input / Output	Hierarchy
StatusObject	String		Input	Property

- Business Server Method: Insert

Table 44. Business Service Method Arg

Name	Data Type	Integration Object	Type	Storage Type
SiebelMessage	Integration Object	CSIntegSEBLSIAPayment Interface	Input / Output	Hierarchy
StatusObject	String		Input	Property

- Business Server Method: InsertOrUpdate

Table 45. Business Service Method Arg

Name	Data Type	Integration Object	Type	Storage Type
SiebelMessage	Integration Object	CSIntegSEBLSIAPayment Interface	Input / Output	Hierarchy
StatusObject	String		Input	Property

- Business Server Method: QueryByExample

Table 46. Business Service Method Arg

Name	Data Type	Integration Object	Type	Storage Type
SiebelMessage	Integration Object	CSIntegSEBLSIAPaymentInterface	Input / Output	Hierarchy

- Business Server Method: QueryById

Table 47. Business Service Method Arg

Name	Data Type	Integration Object	Type	Storage Type
PrimaryRowId	String		Input	Property
SiebelMessage	Integration Object	CSIntegSEBLSIAPayment Interface	Input / Output	Hierarchy

- Business Server Method: Synchronize

Table 48. Business Service Method Arg

Name	Data Type	Integration Object	Type	Storage Type
SiebelMessage	Integration Object	CSIntegSEBLSIAPayment Interface	Input / Output	Hierarchy
StatusObject	String		Input	Property

- Business Server Method: Update

Table 49. Business Service Method Arg

Name	Data Type	Integration Object	Type	Storage Type
SiebelMessage	Integration Object	CSIntegSEBLSIAPayment Interface	Input / Output	Hierarchy
StatusObject	String		Input	Property

- Business Service User Prop:

- Name: Application Services Interface
- Value: Y
- Name: Internal Integration Object
- Value: Internal CSIntegSEBLSIAPaymentInterface

Applets

- CG Deduction Admin List Applet (SCW) (Modified)
  - Set "Read Only" = Y for Column "Deduction Amount"
  - Set "Read Only" = Y for Column "Account"
  - Set "No Delete" = Y
  - Remove Applet Web Template Item "DeleteRecord" from Applet Web Template - Edit List
- CG Deduction Details Form Admin Applet (SCW) (Modified)
  - Set "Read Only" = Y for Control "DeductionAmount"
  - Set "Read Only" = Y for Control "Account"
  - Set "No Delete" = Y
  - Remove Applet Web Template Item "DeleteRecord" from Applet Web Template - Edit
- CG Deduction Details Form Applet (SCW) (Modified)
  - Set "Read Only" = Y for Control "Account"
- CG Deduction List Applet (SCW) (Modified)
  - Set "Read Only" = Y for Column "Account"
- CG Deduction Parent Split Applet (Modified)
  - Set "Read Only" = Y for Column "Deduction Amount"
  - Set "Read Only" = Y for Column "Account"
  - Set "No Delete" = Y
  - Remove Applet Web Template Item "DeleteRecord" from Applet Web Template - Edit List
- CG Deduction Split Form Applet (Modified)
  - Set "Read Only" = Y for Control "Account"
- CG Deduction Split List Applet (Modified)
  - Set "Read Only" = Y for Column "Account"
- CPG Account Credit Memo Admin Form Applet (Modified)
  - Set "No Delete" = Y
  - Set "No Update" = Y
- CPG Account Credit Memo Admin List Applet (Modified)

- Set "No Delete" = Y
- Set "No Update" = Y

Enter the following seed data by Siebel Client:

Workflow Deployment

To deploy workflows

1. Log in to Siebel Tools and navigate to Workflows.
2. Right click and select the Import workflow process.
3. Give the above listed workflow "CSIntegSEBLSIAPaymentInsertOuboundFlow.xml" and select the Project as CS CG Deduction Interface and click OK.
4. Query for the workflow and deploy it by clicking Publish/Activate on the WF/Task Editor Toolbar.

   Enable the toolbar by selecting View > Toolbars > WF/Task Editor Toolbar.
5. Login to the Siebel UI and navigate to Administration > Business Processes > Workflow Deployment.
6. Query for the Workflow deployed and click Activate.

Web Service Deployment

To deploy Web Services

1. Log in to Siebel UI and navigate to Administration > Web Services > Inbound Web Services.
2. Click Import and specify the following Web Services to be imported:
   - CSIntegSEBLSIADeductionAndPayment_InboundWS.XML
   - CSIntegSEBLSIAResolutionAndPayment_InboundWS.XML
3. After the inbound Web Service is imported, validate the address of the Siebel server in the Service Ports applet.

   The address must be the correct Siebel server name that the client must connect to. If required, change the address and provide a valid username and password.

   Inbound Web Service is created as follows:
   - Name: CSIntegSEBLSIADeductionAndPayment

- Namespace: http://siebel.com/asi/

Service Port

Name	Type	Business Service / Process	Transport	Address	Binding
Default	Business Service	Deduction and Payment - Siebel Inbound	HTTP	http://<webserver>/eai_<lang>/start.swe?SWEExtSource=SecureWebService&SWEExtCmd=Execute&UserName=<UserName>&Password=<Password>	SOAP_RPC_LITERAL

Operations

Name	Method Display Name	Authentication Type
SiebelDeductionPaymentInsert	Insert	None
SiebelDeductionPaymentInsertOrUpdate	Insert or Update	None
SiebelDeductionPaymentQueryById	Query by ID	None
SiebelDeductionPaymentSynchronize	Synchronize	None
SiebelDeductionPaymentUpdate	Update	None

4 Click Clear Cache.

Inbound Web Service is created as follows:

- Name: CSIntegSEBLSIAResolutionAndPayment

- Namespace: http://siebel.com/asi/

Service Port

Name	Type	Business Service / Process	Transport	Address	Binding
Default	Business Service	Resolution and Payment - Siebel Inbound	HTTP	http://<webserver>/eai_<lang>/start.swe?SWEExtSource=SecureWebService&SWEExtCmd=Execute&UserName=<UserName>&Password=<Password>	SOAP_RPC_LITERAL

Operations

Name	Method Display Name	Authentication Type
SiebelPaymentQueryById	Query by ID	None

5 Navigate to Administration > Web Services > Outbound Web Services.

6 Click Import and specify the Web Service "CRMIntegUpsertDeductionSEBL80ToEBS11i10Sync.xml" to be imported.

Outbound Web Service: CRMIntegUpsertDeductionSEBL80ToEBS11i10Sync.xml

7 After the outbound Web Service is imported, validate the address of the BPEL server in the Service Ports applet.

The address must be the correct BPEL server that the client must connect to. If required, change the address and save.

The outbound Web Service is created as follows:

- Name: CRMIntegUpsertDeductionSEBL80ToEBS11i10Sync

- Namespace: http://xmlns.oracle.com/CRMIntegUpsertDeductionSEBL80ToEBS11i10Sync

Service Port

Name	Service Display Name	Transport	Address	Binding
CRMIntegUpsertDeductionSEBL80ToEBS11i10SyncPort	Resolution and Payment - Siebel Outbound	HTTP	http://<host-info>/orabpel/default/CRMIntegUpsertDeductionSEBL80ToEBS11i10Sync/1.0	SOAP_DOC_LITERAL

Operations

Method Display Name	Authentication Type
Process	None

8 Click Clear Cache.

State Model

To manage states

1 Log in to Siebel UI and navigate to Administration > Application > State Model.

2 Click New to create a new state model:

- Name: CS CG Deduction and Payment Status
- Business Component: CS CG Deduction and Payment
- Field: Payment Status

3 Click the State tab to create the following states:

State Name	Default	No Delete	No Update	Restrict Transition	Description
Closed	N	N	N	Y	Closed
In Progress	N	N	N	Y	In Progress
Inactive	N	N	N	Y	Inactive
Open	Y	N	N	Y	Open
Resolved	N	N	N	Y	Resolved
Submitted	N	N	N	Y	Submitted

4 Click the Transitions tab to create the following transactions:

From State	To State	Public	Rule Expression
In Progress	Inactive	Y	[Deduction Status Read Only Flag] = "N"
In Progress	Open	Y	[Deduction Status Read Only Flag] = "N"
Inactive	Open	Y	[Deduction Status Read Only Flag] = "N"
Open	Inactive	Y	[Deduction Status Read Only Flag] = "N"
Resolved	Open	Y	[Deduction Status Read Only Flag] = "N"
Resolved	Closed	Y	
Resolved	Inactive	Y	[Deduction Status Read Only Flag] = "N"
Submitted	Closed	Y	

Leave other columns empty.

5 Restart the Siebel Server.

Setting Up Promotions

Repository changes for Promotions

To import Siebel Artifacts

1 Log into Siebel 8.0 Tools and lock the following projects:

New / Modified	Project	Description
Modified	CPG Plan	Holds Promotion Integration related objects. Changed BO, New Int Objects, New Bus Comps. New Links
Modified	CPG Promotion	None
Modified	CPG Promotion Product	None
Modified	CS CG Promotion Category	None
Modified	Symbolic Strings	None

2 Import the ACR358_Promotions.sif file from the Siebel Quick Fix build, which contains new and modified repository objects.

The following table contains the description of changes for each repository object:

Symbolic Strings

Name	Current String Value	Definition
SBL_CG_INTEG_PROMOTION_UPSERT_SERVICE_OUTBOUND	CGIntegPromotionUpsertService - Siebel Outbound	Siebel Bus Service created while importing BPEL Process, used to invoke the process
SBL_CG_PROMOTION_UPSERT_SERICE_OUTBOUND	CGPromotionUpsertService - Siebel Outbound	Siebel Bus Service to QueryById to create input for Outbound BPEL Web Service
SBL_CG_PROMO_PRODUCT_UPDATE_SERVICE	CGPromoProductUpdateService - Siebel Inbound	Siebel Inbound Service for Promoted Product

Business Components

- Name: CPG Plan Account Promotion (Modified)

Table 50. Fields

New?	Name	Description	Comments
Modified	Calculated Field Read Only Flag	[Field Read Only Flag]	Value changed from IIf([Phasing Enable Flag]='N', 'N', [Field Read Only Flag]).
Modified	Delete Flag	NOT [Read Only Flag]	Value changed from IIf([Phasing Enable Flag]='N', 'Y', [Phasing Delete Flag]
Modified	End Date Promo for Acct	Changed Type to DTYPE_UTCDATETIME	Changed from DTYPE_DATE
Modified	Field Read Only Flag	[Field Read Only Flag Calculated]	None
Modified	Start Date Promo for Acct	Changed Type to DTYPE_UTCDATETIME	Changed from DTYPE_DATE

Table 51. BC User properties

New?	Name	Value
New	Field Read Only Field: Account	Read Only Flag
New	Field Read Only Field: End Date Cons for Acct	Read Only Flag
New	Field Read Only Field: End Date Shipments for Acct	Read Only Flag
New	Field Read Only Field: Organization Name	Read Only Flag
New	Field Read Only Field: Period Name	Read Only Flag
New	Field Read Only Field: Plan Account Promotion Name	Read Only Flag
New	Field Read Only Field: Start Date Cons for Acct	Read Only Flag
New	Field Read Only Field: Start Date Promo for Acct	Read Only Flag
New	Field Read Only Field: Start Date Shipments for Acct	Calculated Field

Table 51. BC User properties

New?	Name	Value
New	Named Method 1	"InvokeWF", "INVOKE", "CPG Plan Account Promotion", "WriteRecord"
New	Named Method 2	"InvokeWF", "INVOKESVC", "CPG Plan Account Promotion", "Workflow Process Manager", "RunProcess", "'ProcessName'", "'CGIntegSEBLPromotionUpsertOutboundFlow'", "'Object Id'", "[Id]"
New	Named Method 3	"Commit", "INVOKE", "CPG Plan Account Promotion", "WriteRecord"
New	Named Method 4	"Commit", "INVOKESVC", "CPG Plan Account Promotion", "Workflow Process Manager", "RunProcess", "'ProcessName'", "'CGIntegSEBLPromotionUpsertOutboundFlow'", "'Object Id'", "[Id]"
New	On Field Update Invoke 1	"Account Promotion Status", "CPG Plan Account Promotion", "InvokeWF", "[Account Promotion Status]=LookupValue(""CAMPAIGN_STATE"", ""Finalized"")"
New	On Field Update Invoke 3	"End Date Promo for Acct", "CPG Plan Account Promotion", "Commit", "[Account Promotion Status]=LookupValue(""CAMPAIGN_STATE"", ""Finalized"")"

- Name: CPG Plan Account Promotion Product (Modified)

Table 52. Fields

New?	Name	Description	Comments
Modified	Delete Flag	NOT [Read Only Flag]	Changed from [Read Only Flag] = "N".
New	No Insert Flag	[Account Promotion Status] = LookupValue("CAMPAIGN_STATE", "Finalized") OR [Account Promotion Status] = LookupValue("CAMPAIGN_STATE", "Re-opened")	None
Modified	Read Only Flag	IIf((([IsProductFinalized] = "Y" AND [IsPromotionFinalized] = "Y") OR [Account Promotion Status] = LookupValue("CAMPAIGN_STATE", "Re-opened")), "Y", "N")	Changed from value changed, Phasing Enable flag condition removed
Modified	Unit of Measure	Made Active	Was inactive, activated.

Table 53. BC User properties

New?	Name	Value	Description
Modified	BC No Insert Field	No Insert Flag	Changed from Read Only Flag

■ Name: CS CG MDF Promotion Category Allocation (Modified)

Table 54. Fields

New?	Name	Description	Comments
Modified	Account Promotion Status	Pre-default added: Parent: 'CS CG Plan Account Promotion Category.Account Promotion Status' and Immediate Post Change =True	None
Modified	Amount Field Read Only Flag	IIf(([Deal Category Type] = LookupValue("MDF_ALLOC_CATEGORIZATION_TYPE", "Fixed") AND [Account Promotion Status] <> LookupValue("CAMPAIGN_STATE", "Finalized")), 'N', 'Y')	Value changed from IIf([Deal Category Type] = LookupValue("MDF_ALLOC_CATEGORIZATION_TYPE", "Fixed"), 'N', 'Y')
Modified	IsSubmitted OrPaidPayments	[IIf((([Payments Sub] IS NOT NULL AND [Payments Sub] <> 0.0) OR ([Payments Paid] IS NOT NULL AND [Payments Paid] <> 0.0) OR [Read Only Flag] = 'Y'), "Y", "N")	Value changed from IIf(([Payments Sub] IS NOT NULL AND [Payments Sub] <> 0.0) OR ([Payments Paid] IS NOT NULL AND [Payments Paid] <> 0.0), "Y", "N")
Modified	No Insert Flag	[Row Id] IS NOT NULL	To disable New when Promotion is Accepted, since Deal gets committed. If Insert allowed these new deals can never be committed [Account Promotion Status] = LookupValue("CAMPAIGN_STATE", "Accepted") OR [Account Promotion Status] = LookupValue("CAMPAIGN_STATE", "Finalized") OR [Account Promotion Status] = LookupValue("CAMPAIGN_STATE", "Re-opened")
New	PriceAdjType Amount Read Only	[Account Promotion Status] = LookupValue("CAMPAIGN_STATE", "Finalized") OR [Account Promotion Status] = LookupValue("CAMPAIGN_STATE", "Re-opened")	New validation

Table 54. Fields

New?	Name	Description	Comments
Modified	Rate Volume Field Read Only Flag	IIf((([Deal Category Type] = LookupValue("MDF_ALLOC_CATEGORIZATION_TYPE", "Deferred") or [Deal Category Type] = LookupValue("MDF_ALLOC_CATEGORIZATION_TYPE", "On Invoice")) AND [Read Only Flag] <> 'Y'), "N", "Y")	Value changed from IIf([Deal Category Type] = LookupValue("MDF_ALLOC_CATEGORIZATION_TYPE", "Deferred") or [Deal Category Type] = LookupValue("MDF_ALLOC_CATEGORIZATION_TYPE", "On Invoice"), "N", "Y")
Modified	Read Only Flag	[Account Promotion Status] = LookupValue("CAMPAIGN_STATE", "Finalized")	Value changed from [Account Promotion Status] = LookupValue("CAMPAIGN_STATE", "Finalized") AND [Promotion Phasing Enable Flag] = "Y"; Phasing condn removed
New	Row Id	Mapped to Column ROW_ID	Used in Field No Insert Flag.

Table 55. BC User Properties

New?	Name	Value	Description
Modified	BC No Insert Field	No Insert Flag	Changed from Read Only Flag
Modified	BC Read Only Field	Read Only Flag	Inactivated
New	Field Read Only Field: Price Adjustment Amount	PriceAdjTypeAmount Read Only	None
New	Field Read Only Field: Price Adjustment Type	PriceAdjTypeAmount Read Only	None

- Name: CS CG Plan Account Promotion Category (Modified)

Table 56. Fields

New?	Name	Description	Comments
Modified	Delete Flag	IIf (([Read Only Flag] = 'Y' OR [Account Promotion Status] = LookupValue("CAMPAIGN_STATE", "Re-opened") OR [Account Promotion Status] = LookupValue("CAMPAIGN_STATE", "Accepted")), "N", "Y")	Value changed from IIf([Promotion Phasing Enable Flag]='N', 'Y', [Phasing Delete Flag])
New	No Insert Flag	[Account Promotion Status] = LookupValue("CAMPAIGN_STATE", "Accepted") OR [Account Promotion Status] = LookupValue("CAMPAIGN_STATE", "Finalized") OR [Account Promotion Status] = LookupValue("CAMPAIGN_STATE", "Re-opened")	New field for No Insert for Promoted Category
Modified	Read Only Flag	IIf ([IsCategoryFinalized] = "Y" AND [IsPromotionFinalized] = "Y", "Y", "N")	Value changed from IIf ([IsCategoryFinalized] = "Y" AND [IsPromotionFinalized] = "Y" AND [Promotion Phasing Enable Flag] = "Y", "Y", "N").

Table 57. BC User Properties

New?	Name	Value	Description
Modified	BC No Insert Field	No Insert Flag	Value changed from Read Only Flag
Modified	BC Read Only Field	Read Only Flag	Inactivated
New	Field Read Only Field:% Promoted ACV	Period Read Only Field	None
New	Field Read Only Field: Category Name	Read Only Flag	None
New	Field Read Only Field: End Date Promo for Acct	Read Only Flag	None

Table 57. BC User Properties

New?	Name	Value	Description
New	Field Read Only Field: Period Name	Read Only Flag	None
New	Field Read Only Field: Start Date Promo for Acct	Read Only Flag	None

- Name: ExtIntegCG MDF Promotion Category Allocation (New)

MDF Promotion Category Allocation

Table 58. Fields

Name	Pre-default Value	Join	Column	Picklist	Comments
Promotion Name		Fund Promotion	NAME		None
Account Type		S_ORG_EXT	OU_TYPE_CD	PickList Account Type	Pick Map: Field and value
Organization Id	System: Organization Id	Fund Promotion	BU_ID		None
Organization Name	System: Organization Name	S_BU	NAME	PickList Internal Division - CPG	Pick Map same as in Account Promotion BC
Start Date Promo for Acct		Fund Promotion	PROG_START_DT		None
End Date Promo for Acct		Fund Promotion	PROG_END_DT		None
Period Id			ROW_ID		None
Price List Id		Fund Promotion	PROMO_PRI_LST_ID		None
Price List		S_PRI_LST	NAME	CPG PickList Price List	Pick Map same as in Promotion BC
Start Date Shipments for Acct		Fund Promotion	SHIP_START_DT		None
End Date Shipments for Acct		Fund Promotion	SHIP_ENDDT		None

- Name: ExtIntegCPG Plan Account Promotion Product (New)

Account Promotion Product

Table 59. Fields

New?	Name	Description	Comments
Modified	Unit of Measure	Made Active	None
Modified	Period Id	Column changed to ROW_ID	Id field is the system field and it does not gives a value to in the Int Object-> Int Component

- Name: IntegCPG Plan Account Promotion Product (New)

Account Promotion Product

Table 60. BC User properties

New?	Name	Value	Description
Modified	BC No Insert Field	Read Only Flag	Made inactive
Modified	BC Read Only Field	Read Only Flag	Made inactive
New	IsIntegPromoProductBC	Y	Used in code; to execute a portion of code only if the UP is present in the BC

Links (New)

- Name: CPG Plan Account Promotion/ExtIntegCG MDF Promotion Category Allocation

Table 61. Link Spec

Parent Bus Comp	Child Bus Comp	Source Field	Destination Field
CPG Plan Account Promotion	ExtIntegCG MDF Promotion Category Allocation	Id	Fund Promotion Id

- Name: CS CG Plan Account Promotion Category/IntegCPG Plan Account Promotion Product

Table 62. Link Spec

Parent Bus Comp	Child Bus Comp	Source Field	Destination Field
CS CG Plan Account Promotion Category	IntegCPG Plan Account Promotion Product	Id	Plan Account Promotion Cat Id

- Name: ExtIntegCG MDF Promotion Category Allocation/ExtIntegCPG Plan Account Promotion Product

Table 63. Link Spec

Parent Bus Comp	Child Bus Comp	Source Field	Destination Field
ExtIntegCG MDF Promotion Category Allocation	ExtIntegCPG Plan Account Promotion Product	Plan Account Promotion Cat Id	Plan Account Promotion Cat Id

Business Objects

- Name: CPG Plan (modified)

Table 64. Business Object Components

New?	Bus Comp	Link	Comments
New	IntegCPG Plan Account Promotion Product	CS CG Plan Account Promotion Category/IntegCPG Plan Account Promotion Product	None
New	ExtIntegCPG Plan Account Promotion Product	ExtIntegCG MDF Promotion Category Allocation/ExtIntegCPG Plan Account Promotion Product	None
New	ExtIntegCG MDF Promotion Category Allocation	CPG Plan Account Promotion/ ExtIntegCG MDF Promotion Category Allocation	None

- Name: CPG Account Promotion (New)

Table 65. Business Object Components

New?	Bus Comp	Link	Comments
New	IntegCPG Plan Account Promotion Product	CS CG Plan Account Promotion Category/IntegCPG Plan Account Promotion Product	None
New	ExtIntegCPG Plan Account Promotion Product	ExtIntegCG MDF Promotion Category Allocation/ExtIntegCPG Plan Account Promotion Product	None
New	ExtIntegCG MDF Promotion Category Allocation	CPG Plan Account Promotion/ ExtIntegCG MDF Promotion Category Allocation	None
Modified	CPG Plan Account Promotion	CPG Plan Account/CPG Plan Account Promotion	Link is removed

Primary Business Component specified as 'CPG Plan Account Promotion'

Applets (Modified)

- Name: CG Promotion List Applet Non-Corporate

Table 66. List Columns

New?	Name	Description	Comments
Modified	End Date Promo for Acct	Display Format specified as Date	None
Modified	Start Date Promo for Acct	Display Format specified as Date	None
Modified	Phasing Enable Flag	Display Name: Phasing Enable	This is unmapped

- Name: CPG Plan Account Promotion Product List Applet

Table 67. List Columns/Controls

New?	Name	Description	Comments
Modified	Promotion Phasing Enable Flag	Display Name: Phasing Enable	This is unmapped
Modified	PhaseProduct	Display Name: Phase	This is a Button that is unmapped
Modified	RecalcProduct	Display Name: Recalculate	This is a Button that is unmapped

Table 68. Applet User Property

New?	Name	Value	Comments
New	CanInvokeMethod: DeleteRecord	[Delete Flag]	To disable delete button when Promotion Finalized

- Name: CS CG Promoted Category Deal List Applet

Table 69. List Columns

New?	Name	Description	Comments
Modified	Promotion Phasing Enable Flag	Display Name: Phasing Enable	This is unmapped

- Name: CS CG Promoted Category List Applet

Table 70. List Columns/Controls

New?	Name	Description	Comments
Modified	Phasing Enable Flag	Display Name: Phasing Enable	This is unmapped
Modified	Phasing Pattern	Display Name: Phasing Pattern	This is unmapped
Modified	Phasing Status	Display Name: Phasing Status	This is unmapped

Table 70. List Columns/Controls

New?	Name	Description	Comments
Modified	PhaseProduct	Display Name: Phase	This is a button that is unmapped.
Modified	RecalcProduct	Display Name: Recalculate	This is a button that is unmapped.

Integration Objects

- Name: InternalCGIntegSEBLPromoProductInterface (New)
  - Project: CPG Plan
  - Base Object Type: Siebel Business Object
  - External Name: CPG Plan
  - XML Tag: ListOfInternalcgintegseblpromoproductinterface

Integration Components

- Name & External Name: IntegCPG Plan Account Promotion Product
  - Parent Integration Component: None
  - XML Container Element: None
  - XML Tag: IntegCPG Plan Account Promotion Product
  - Cardinality: Zero or More
- Name: CGIntegSEBLPromoProductInterface (New)
  - Project: CPG Plan
  - Base Object Type: XML
  - External Name: CPG Plan
  - XML Tag: ListOfInternalcgintegseblpromoproductinterface

Integration Components

- Name & External Name: IntegCPG Plan Account Promotion Product
  - Parent Integration Component: None
  - XML Container Element: None
  - XML Tag: IntegCPG Plan Account Promotion Product
  - Cardinality: Zero or More
- Name: CGIntegSEBLPromotionInterface (New)
  - Project: CPG Plan
  - Base Object Type: Siebel Business Object

- External Name: CPG Plan
- XML Tag: ListOfCgintegseblpromotioninterface

Integration Components

- Name & External Name: ExtIntegCG MDF Promotion Category Allocation
  - Parent Integration Component: None
  - XML Container Element: None
  - XML Tag: ExtIntegCG MDF Promotion Category Allocation
  - Cardinality: Zero or One
- Name & External Name: ExtIntegCPG Plan Account Promotion Product
  - Parent Integration Component: ExtIntegCG MDF Promotion Category Allocation
  - XML Container Element: ListOfExtintegcpgPlanAccountPromotionProduct
  - XML Tag: ListOfExtintegcpgPlanAccountPromotionProduct
  - Cardinality: Zero or More
- Name: CGIntegSEBLSIAPromotionFaultMessage (New)
  - Project: CPG Plan
  - Base Object Type: XML
  - External Name: CPG Plan
  - XML Tag: ListOfCgintegseblpromotioninterface

Integration Components

- Name & External Name: ExtIntegCG MDF Promotion Category Allocation
  - Parent Integration Component: None
  - XML Container Element: None
  - XML Tag: ExtIntegCG MDF Promotion Category Allocation
  - Cardinality: Zero or One
- Name & External Name: ExtIntegCPG Plan Account Promotion Product
  - Parent Integration Component: ExtIntegCG MDF Promotion Category Allocation
  - XML Container Element: ListOfExtintegcpgPlanAccountPromotionProduct
  - XML Tag: ListOfExtintegcpgPlanAccountPromotionProduct
  - Cardinality: Zero or More
- Name & External Name: faultMessage
  - Parent Integration Component: ExtIntegCG MDF Promotion Category Allocation
  - XML Container Element: None

- XML Tag: faultMessage
- Cardinality: Zero or One

- Name & External Name: errorMessage
  - Parent Integration Component: faultMessage
  - XML Container Element: None
  - XML Tag: errorMessage
  - Cardinality: Zero or More

Business Service

- Name: CGIntegSEBLPromoProductUpdate (New)
  - Class: CSSEAIDataSyncService
  - External Use: Y
  - State Management Type: Stateful
  - Display Name: CGPromoProductUpdateService - Siebel Inbound

Table 71. Business Service Methods

Name	Display Name
Delete	Delete
Insert	Insert
InsertOrUpdate	Insert or Update
Synchronize	Synchronize
Update	Update

Table 72. Business Service Method Arguments

Name	Data Type	Integration Object	Type	Optional	Storage Type	Display Name	Comments
Siebel Message	Integration Object	CGIntegSEBLPromoProductInterface	Input / Output	N	Hierarchy	Account Interface	None
Status Object	String		Input	Y	Property	Status Object	Pick Field = Id PickList = EAI Boolean Message Property PickList

- Name: QueryByExample
- Display Name: Query by Example

Table 73. Business Service Method Arguments

Name	Data Type	Integration Object	Type	Optional	Storage Type	Display Name	Comments
SiebelMessage	Integration Object	CGIntegSEBLPromoProductInterface	Input / Output	N	Hierarchy	Account Interface	None

- Name: QueryById
- Display Name: Query by ID

Table 74. Business Service Method Arguments

Name	Data Type	Integration Object	Type	Optional	Storage Type	Display Name	Comments
PrimaryRowId	String		Input	N	Property	ID	None
SiebelMessage	Integration Object	CGIntegSEBLPromoProductInterface	Output	N	Hierarchy	Account Interface	None

Table 75. Business Service User Prop

Name	Value
Application Services Interface	Y
Internal Integration Object	InternalCGIntegSEBLPromoProductInterface

- Name: CGIntegSEBLPromotionUpsertService (New)
  - Class: CSSEAIDataSyncService
  - External Use: Y
  - State Management Type: Stateful

- Display Name: CGPromotionUpsertService - Siebel Outbound

Table 76. Business Service Methods

Name	Display Name
Delete	Delete
Insert	Insert
InsertOrUpdate	Insert or Update
Synchronize	Synchronize
Update	Update

Table 77. Business Service Method Arguments

Name	Data Type	Integration Object	Type	Optional	Storage Type	Display Name	Comments
Siebel Message	Integration Object	CGIntegSEBLSIAPromotionFaultMessage	Input / Output	N	Hierarchy	Account Interface	None
Status Object	String		Input	Y	Property	Status Object	Pick Field = Id PickList = EAI Boolean Message Property PickList

- Name: QueryByExample
- Display Name: Query by Example

Table 78. Business Service Method Arguments

Name	Data Type	Integration Object	Type	Optional	Storage Type	Display Name	Comments
Siebel Message	Integration Object	CGIntegSEBLSIAPromotionFaultMessage	Input / Output	N	Hierarchy	Account Interface	None

- Name: QueryById

- Display Name: Query by ID

Table 79. Business Service Method Arguments

Name	Data Type	Integration Object	Type	Optional	Storage Type	Display Name	Comments
Primary RowId	String		Input	N	Property	ID	None
SiebelMessage	Integration Object	CGIntegSEBLSIAPromotionFaultMessage	Output	N	Hierarchy	Account Interface	None

Table 80. Business Service User Prop

Name	Value
Application Services Interface	Y
Internal Integration Object	CGIntegSEBLPromotionInterface

- Name: CRMIntegUpsertPromotionSEBL80ToEBS11i10Sync (New)
  - Class: CSSWSOutboundDispatcher
  - External Use: Y
  - State Management Type: Stateful
  - Display Name: CGIntegPromotionUpsertService - Siebel Outbound

Business Service Methods

- Name: process

- Display Name:

Table 81. Business Service Methods

Name	Data Type	Integration Object	Type	Optional	Storage Type	Display Name	BS Method Arg User Prop
CRMIntegUpsertPromotionSEBL80ToEBS11i10SyncRequestMessage:payload	Integration Object	CGIntegSEBLSIAPromotionFaultMessage	Input	Y	Hierarchy	payload	WSDLPartName = payload XMLElementName = ListOfCgintegseblpromotioninterface XMLElementNamespace = http://www.siebel.com/xml/CGIntegSEBLPromotionInterface
CRMIntegUpsertPromotionSEBL80ToEBS11i10SyncResponseMessage:payload	Integration Object	CGIntegSEBLSIAPromotionFaultMessage	Output	Y	Hierarchy	payload	WSDLPartName = payload XMLElementName = ListOfCgintegseblpromotioninterface XMLElementNamespace = http://www.siebel.com/xml/CGIntegSEBLPromotionInterface
CustomHeaderContext	Hierarchy		Input/ Output	Y	Hierarchy		

Table 81. Business Service Methods

Name	Data Type	Integration Object	Type	Optional	Storage Type	Display Name	BS Method Arg User Prop
XMLHierarchyOutput	Hierarchy		Output	Y		XMLHierarchyOutput	
faultactor	String		Output	Y	Property		
faultcode	String		Output	Y	Property		
faultstring	String		Output	Y	Property		

Seed Data Changes

1. Navigate to Administration Application > State Models.
2. Query for Plan Account Promotion Status.
3. Click the Transitions tab and query for the Finalized state using the From State field.

   A record is retrieved with From State as Finalized and To State as Re-opened.
4. Delete this record.

Workflow Deployment

To deploy workflows

1. Log in to Siebel Tools and navigate to Workflows.
2. Right click and select the Import Workflow process.
3. Enter the above listed workflow "CGIntegSEBLPromotionUpsertOutboundFlow" and select the Project as CPG Plan.
4. Click OK.
5. Query for the workflow. The workflow should be created as follows:
   - Workflow Process Name: CGIntegSEBLPromotionUpsertOutboundFlow
   - Workflow Mode: Service Flow

- WF Process Properties:

Name	In/Out	Business Object	Data Type	Access Mode
BinaryMSG	In/Out	CPG Account Promotion	String	RW
Deal Id	In/Out	CPG Account Promotion	String	RW
Deal Instance	In/Out	CPG Account Promotion	Hierarchy	RW
Error Code	In/Out	CPG Account Promotion	String	RW
Error Message	In/Out	CPG Account Promotion	String	RW
Fault Message	In/Out	CPG Account Promotion	Hierarchy	RW
IsError	In/Out	CPG Account Promotion	String	RW
Object Id	In/Out	CPG Account Promotion	String	RW
Process Instance Id	In/Out	CPG Account Promotion	String	RW
Promotion First Exec	In/Out	CPG Account Promotion	String	RW
Siebel Operation Object Id	In/Out	CPG Account Promotion	String	RW

6 Deploy the workflow by clicking Publish/Activate on the WF/Task Editor Toolbar.

Display the toolbar by selecting View > Toolbars > WF/Task Editor Toolbar.

7 Login to Siebel UI and navigate to Administration > Business Processes > Workflow Deployment.

8 Query for the Workflow deployed and click Activate.

Web Service Deployment

To deploy Web Services

1 Log in to Siebel UI and navigate to Administration > Web Services > Inbound Web Services.

2 Click Import and specify "CGIntegSEBLPromoProductUpdate.xml" as the Web Service to be imported.

Inbound Web Service: CGIntegSEBLPromoProductUpdate

3 After the inbound Web Service is imported, verify the Siebel Server address in the Service Ports applet.

It should have the address of the correct Siebel server that the client must connect to. If required, change the address and provide a valid user name and password.

Inbound Web Service is created as follows:

- Name: CGIntegSEBLPromoProductUpdate (New)
- Service Port

Name	Type	Business Service / Process	Transport	Address	Binding
CGIntegSEBLPromoProductUpdate	Business Service	CGPromoProductUpdateService - Siebel Inbound	HTTP	http://<webserver>/eai_<lang>/start.swe?SWEExtSource=SecureWebService&SWEExtCmd=Execute&UserName=<UserName>&Password=<Password>	SOAP_RPC_LITERAL

- Operations

Name	Method Display Name	Authentication Type
SiebelPromoProductDelete	Delete	None
SiebelPromoProductInsert	Insert	None
SiebelPromoProductInsertOrUpdate	Insert or Update	None
SiebelPromoProductQueryByExample	Query by Example	None
SiebelPromoProductQueryById	Query by ID	None
SiebelPromoProductSynchronize	Synchronize	None
SiebelPromoProductUpdate	Update	None

4. Click Clear Cache.
5. Navigate to Administration > Web Services > Outbound Web Services.
6. Click Import and specify CRMIntegUpsertPromotionSEBL80ToEBS11i10Sync.XML as the Web Service to be imported.

   Outbound Web Service: CRMIntegUpsertPromotionSEBL80ToEBS11i10Sync
7. After the outbound Web Service is imported, verify the BPEL server name in the Service Ports applet.

   The address must have the right BPEL server name that the client must connect to. If required, change the address and save.

   Outbound Web Service is created as follows:

   - Name: CRMIntegUpsertPromotionSEBL80ToEBS11i10Sync (New)
   - Namespace: http://xmlns.oracle.com/CRMIntegUpsertPromotionSEBL80ToEBS11i10Sync

- Service Port

Name	Business Service/Process	Transport	Address	Binding
CRMIntegUpsertPromotionSEBL80ToEBS11i10SyncPort	CRMIntegUpsertPromotionSEBL80ToEBS11i10Sync	HTTP	http://<host-info>/orabpel/default/CRMIntegUpsertPromotionSEBL80ToEBS11i10Sync/1.0	SOAP_DOC_LITERAL

- Operations
  - Method Display Name: Process
  - Authentication Type: None

Setting Up Common Integration Server (Including DVMs and Common Services)

This section describes some integration setup steps that are common across all modules. The topics covered in this section are:

- Defining Data Sources
- Setting Up Asynchronous Error Handling
- Setting Up a Custom GUI Generator
- Setting Up Common Functions
- Setting Up Common Objects
- Importing ID-Xref Seed Data
- Creating Siebel Trade Promotion Management Business Units and Price List Data Mapped to Oracle Trade Management.
- Populating Mappings in ID-Xrefs and DVMs
- Validating and Loading DVMs.

Defining Data Sources

NOTE: All names for data sources and connection pools that are created here are case sensitive.

Define the following data sources using Oracle Enterprise Manager:

Data Source	JNDI Name	Details
Xref	jdbc/xref	A data source pointing to a xrefuser on the 10.1.3 Dehydration Database. Usually it is the database with which the SOA is installed.
CRMIntgDataSource	jdbc/crmintg	A data source pointing to a xrefuser on the 10.1.3 Dehydration Database. Usually it is the database with which the SOA is installed.
locOracleEBSDataSource	OracleEBSDataSource	A data source pointing to the Oracle E-Business Suite data source
jdbcOracleEBSDataSource	jdbc/OracleEBSDataSource	A data source pointing to the Oracle E-Business Suite data source
locErrorDB	loc/ErrorDB	A data source pointing to error database. It can be any database with proper error schema setup in section Setting Up Asynchronous Error Handling. Usually it is the database with which the SOA is installed. For username and password, please refer to section Setting Up Asynchronous Error Handling.
jdbcErrorDB	jdbc/ErrorDB	A data source pointing to an error database. It can be any database with a proper error schema setup in section Setting Up Asynchronous Error Handling. Usually it is the database with which the SOA is installed. For username and password, please refer to section Setting Up Asynchronous Error Handling.

To create database connections

1. Log in to the Application Server Control (for example URL http://localhost:8888/em) as an administrator user (oc4jadmin/welcome1).
2. Click oc4j_soa > Home > Administration tab.
3. Click the Go to Task icon for JDBC Resources under Administration Tasks > Services.

   A list of Data Sources and Connection Pools is displayed.

To create Connection Pools and Data Sources for Xref and CRMIntgDataSource

1. Under Connection Pools, click Create.
2. Accept defaults, and click Continue.

3 Enter the following (leave defaults for the rest):

Name	Xref Connection Pool
JDBC URL	<according to DB Setup> such as jdbc:oracle:thin:@//host:port/service name
Username	<according to DB Setup> such as orabpel
Password	<according to DB Setup> > such as orabpel

4 Click Finish.

5 Click the Test Connection icon for your new connection pool.

6 In the new screen, click Test.

On the main page, a successful connection message is displayed. If you get an error message, check the URL and credentials to ensure you have entered the correct information.

7 Click Finish.

8 Under Data Sources, click Create.

9 Accept the defaults, and click Continue.

10 Enter the following (leave the defaults for the rest):

Name	Xref
JNDI Location	jdbc/xref
Connection Pool	Xref Connection Pool
Transaction Level	Global & Local Transactions

11 Click Finish.

12 Under Data Sources, click Create again.

13 Accept the defaults, and click Continue.

14 Enter the following (leave the defaults for the rest):

Name	CRMIntgDataSource
JNDI Location	jdbc/crmintg
Connection Pool	Xref Connection Pool
Transaction Level	Global & Local Transactions

Creating an Oracle E-Business Suite Data Source

To configure the Oracle e-Business Suite Data Source

1 Under Connection Pools, click Create.

2 Accept the defaults, and click Continue.

3 Enter the following (leave defaults for the rest):

Name	OracleEBSDataSource
JDBC URL	<according to Oracle E-Business Suite DB Setup> jdbc:oracle:thin:@//host:port/service name For example: jdbc:oracle:thin:@//ap6132rt.us.oracle.com:1525/cgtut102
Username	<according to Oracle E-Business Suite DB Setup> enter an E-Business Suite username that has APPS schema Privilege (for example, APPS)
Password	<according to Oracle E-Business Suite DB Setup> enter an E-Business Suite username password that has APPS schema Privilege (for example, APPS)

4 Click Finish.

5 Click the Test Connection icon for your new connection pool.

6 In the new screen, click Test.

Back on the main page, a successful connection message is displayed. If you get an error message, check the URL and credentials to ensure you've entered the right information.

7 Click Finish.

8 Under Data Sources, click Create.

9 Accept the defaults, and click Continue.

10 Enter the following (leave the defaults for the rest):

Name	locOracleEBSDataSource
JNDI Location	loc/OracleEBSDataSource
Connection Pool	OracleEBSDataSource

11 Click Finish.

12 Under Data Sources, click Create.

13 Accept the defaults, and click Continue.

14 Enter the following (leave the defaults for the rest):

Name	jdbcOracleEBSDataSource
JNDI Location	jdbc/OracleEBSDataSource
Connection Pool	OracleEBSDataSource

15 Click Finish.

Creating Error Database Connection Information

To configure the Error DB Data Source

1 Under Connection Pools, click Create.

2 Accept defaults, and click Continue.

3 Enter the following (leave the defaults for the rest):

Name	ErrorDB
JDBC URL	<according to error DB Setup> jdbc:oracle:thin:@//host:port/service name For example, jdbc:oracle:thin:@//SDCHS20N405.siebel.com:1521/oracle
Username	<according to error DB Setup>
Password	<according to error DB Setup>

4 Click Finish.

5 Click the Test Connection icon for your new connection pool.

6 In the new screen, click Test.

Back on the main page, a successful connection message is displayed. If you get an error message, check the URL and credentials to ensure you have entered the right information.

7 Click Finish.

8 Under Data Sources, click Create.

9 Accept the defaults, and click Continue.

10 Enter the following (leave the defaults for the rest):

Name	locErrorDB
JNDI Location	loc/ErrorDB
Connection Pool	ErrorDB

11 Click Finish.

12 Under Data Sources, click Create.

13 Accept the defaults, and click Continue.

14 Enter the following (leave the defaults for the rest):

Name	jdbcErrorDB
JNDI Location	jdbc/ErrorDB
Connection Pool	ErrorDB

15 Click Finish.

Creating Adapter Data Source

To configure Adapter Data Source

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 your SOA application server name.

4 Click 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/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.

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/OracleEBSDataSource.

f Under Connection Pooling, select No Connection Pool.

g Under Configuration Properties, enter the data source 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 the data source 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 the data source as loc/ErrorDB and xADataSource as jdbc/ErrorDB.

n Click Finish.

Setting Up Asynchronous Error Handling

CRMIntegErrorHandlerService requires a database to store information. Connect to the error database using SQL client, as sys user, for example, sys/manager, and do following configuration.

To configure the error database

1 Create Tablespace.

This step is optional; you can use existing table spaces for ERRORADMIN user.

```
CREATE SMALLFILE TABLESPACE "ERRORHANDLING" DATAFILE
'D:\ORACLEDB10G\PRODUCT\10.2.0\ORADATA\GENESIS0\ERRORHANDLING.DAT' SIZE 100M
AUTOEXTEND ON NEXT 1024K MAXSIZE UNLIMITED LOGGING EXTENT MANAGEMENT LOCAL SEGMENT
SPACE MANAGEMENT AUTO;
```

2 Create User:

```
CREATE USER ERRORADMIN
   IDENTIFIED BY VALUES <PASSWORD here>
  DEFAULT TABLESPACE ERRORHANDLING
  TEMPORARY TABLESPACE TEMP
  PROFILE DEFAULT
ACCOUNT UNLOCK;
```

3 Grant 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 CREATE ANY TYPE 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 ERROR_DATABASE table in 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
);
```

5 Configure SMTP for notification

Edit <ORACLE_AS_HOME>/bpel/system/services/config/ns_email.xml.

Set NotificationMode to EMAI. Set SMTPHost, SMTPPort.

```
<EmailAccounts xmlns="http://xmlns.oracle.com/ias/pcbpel/NotificationService"
               EmailMimeCharset=""
               NotificationMode="EMAIL">
   <EmailAccount>
      <Name>Default</Name>
      <GeneralSettings>
         <FromName>Oracle BPM</FromName>
         <FromAddress>accountId@yourdomain.com</FromAddress>
      </GeneralSettings>
      <OutgoingServerSettings>
         <SMTPHost>mail.oracle.com</SMTPHost>
         <SMTPPort>25</SMTPPort>
      </OutgoingServerSettings>
      <IncomingServerSettings>
         <Server>yourdomain.com</Server>
         <Port>110</Port>
         <Protocol>pop3</Protocol>
         <UserName>accountId</UserName>
         <Password ns0:encrypted="false" xmlns:ns0="http://xmlns.oracle.com/ias/
pcbpel/NotificationService">password</Password>
         <UseSSL>false</UseSSL>
         <Folder>Inbox</Folder>
         <PollingFrequency>1</PollingFrequency>
         <PostReadOperation>
            <MarkAsRead/>
         </PostReadOperation>
      </IncomingServerSettings>
```

```
</EmailAccount>
```

6 Create DVM Map for mapping mail IDs:

CRMIntegErrorHandlerService queries the Email ID of the owner of the faulted process from DVM Map CRMIntegProcessMailId.

a Create DVM Map with the following details:

- Name: CRMIntegProcessMailId
- Domains:
  - ProcessName
  - MailID

b After creating the map, enter process names and the respective email ids. You can also use following to import the map:

```
<?xml version="1.0" encoding="UTF-8"?>

- <dvm name="CRMIntegProcessMailId" isNew="null">

 <description>DVM description</description>

- <columns>

  <column name="ProcessName" />

  <column name="MailID" />

  </columns>

- <rows>

- <row>

  <cell>default</cell>

  <cell>manish.amle@oracle.com</cell>

  </row>

- <row>

  <cell>CRMIntegSyncAccount</cell>

  <cell>manish.amle@oracle.com</cell>

  </row>

  </rows>

  </dvm>
```

Setting Up a Custom GUI Generator

Set up the following environment variables at common prompt. For example, if you are using csh, enter

```
setenv CRMINTG_DB_USER "APPS"
```

- CRMINTG_DB_URL <the same as used by data source CRMIntgDataSource >
- CRMINTG_DB_USER <the same as used by data source CRMIntgDataSource >
- CRMINTG_DB_PASSWORD <the same as used by data source CRMIntgDataSource >
- OC4J_USERNAME
- OC4J_PASSWORD
- CLASSPATH add <SOA_HOME>/bpel/system/classes
- GUID_GENERATOR <set to oracle.crmintg.common.xpath.CRMIntgGUIDGenerator>

Setting Up Common Functions

All related files required for this part are located under the build folder \\build

number\SEBLTPMIntegPkEBSTM\SharedComponents\Utitlity\CommonFunctions.

- Execute create_crmintgCommon_schema.sql on the database that you wish to use for Common Functions. (same database and user which the data source CRMIntgDataSource created in section Defining Data Sources).
- Extract jar file crmintg-common.jar from build folder to <SOA_HOME>\bpel\system\classes with folder structure. You can run jar -xvf crmintg-common.jar at the command prompt.
- Open crmintg-xpath-functionEntries.xml from build folder and copy the contents of this file to the end of <SOA_HOME>\bpel\system\config\xpath-functions.xml file. Before modification, please make a backup copy of xpath-functions.xml.

  NOTE: This content should go inside the top-level element (bpel-xpath-functions), not after that, that is, between <function> and </bpel-xpath-functions>. Reapplying a cross-reference patch requires that this step be performed again.

- In order to show the crmintg common functions in your JDev, do the following;

  a Create an xml file with any name, say anyName.xml. Copy the below contents in a file.

```
<?xml version="1.0" encoding="UTF-8"?>

  <extension-functions>

   <!-- Cross Reference Functions -->

    <functions xmlns:crmintg="http://www.oracle.com/XSL/Transform/java/
oracle.crmintg.common.xpath.CRMIntgXPathFunctions">

 <function name="crmintg:generateCommonID" as="string">
```

```
</function>

<function name="crmintg:generateUniqueID" as="string">

</function>

  </functions>

</extension-functions>
```

b Open Oracle JDeveloper and navigate to JDeveloper > Tools > Preferences > XSL Maps.

c In the first box, User Defined Extension Functions Config File, browse for the file created in Step a and restart JDeveloper.

Importing ID-Xref Seed Data

Use the following steps to import the ID Xref table and column definitions using Xref Command Line Tool:.

1 Copy crmintg_seed_data.txt from <Build Location\SEBLTPMIntegPkEBSTM\SharedComponents\Utility\CommonFunctions to <SOA_HOME>\integration\esb\bin.

2 Execute the following command at <SOA_HOME>\integration\esb\bin:

- On Windows: xreftool -f crmintg_seed_data.txt
- On linux:./xreftool.sh -f crmintg_seed_data.txt

NOTE: This step needs a cross reference patch setup done. Please refer to cross reference documentation for any help to run xreftool command.

Populating Xref Data

This section gives instructions on populating xref data using the xrefimport utility.

To import the metadata and xref values from the specified xml file, the xml file to be imported should comply with xref.xsd.

Some salient points about xref import:

- Can be performed on a clean repository. Xref table and columns are created if they do not exist.
- User can specify the preferred way of handling the duplicate values (Details below).
- User can specify the generation of an xref column along with the values during import.

Syntax:

Can be added to xrefimport classpath by any of the following:

- In Windows: xrefimport -file <fileName> [-mode <ignore | overwrite>] [-generate <columnName>]

- In Unix: ./xrefimpor.sh -file <fileName> [-mode <ignore | overwrite>] [-generate <columnName>]
- -file <fileName> Fully qualified location of the file from which the data is imported
- -mode <ignore | overwrite> (Optional) Preferred way of handling the existing data in case of conflicts. The value “ignore” would keep the existing data in the repository and “overwrite” would overwrite the existing data with the data present in the xml file which is getting imported. Please note that the mode kicks in only in the case of conflicts. The default is “ignore”.
- -generate <column name> (Optional) Column name that has to be created automatically during import.

The import utility is used to create mapping between Oracle Trade Management and Siebel Trade Promotion Management data and the mapping is stored in Xref schema. For example, to create a mapping between Oracle E-Business Suite customer account and Siebel account, use the following steps.

To create a mapping between Oracle E-Business Suite customer account and Siebel Trade Promotion Management account

1. Create a Siebel Trade Promotion Management Account or use an existing account say SiebelTestAcct1 and get the account id as well, say SiebelId1. You can similarly have SiebelTestAcct2, with SiebelId2, and so on.
2. Create an account in Oracle Trade Management or use an existing account, say OracleAcct1, and get the account id for the same, say OracleId1. You can similarly have OracleAcct2, OracleId2.
3. To map, SiebelAcct1 to OracleAcct1, SiebelAcct2 to OracleAcct2, in ACCOUNT table in Xref schema, use the following sample file, AccountXref.xml:

```
<xref xmlns="http://xmlns.oracle.com/xref">
   <table name="ACCOUNT">
      <columns>
         <column name="SIEBEL78_01"/>
    <column name="ORACLE11I10_01"/>
      </columns>
      <rows>
         <row>
            <cell colName="SIEBEL78_01">SiebelId1</cell>
       <cell colName="ORACLE11I10_01">OracleId1</cell>
    </row>

         <row>
```

```
        <cell colName="SIEBEL78_01">SiebelId2</cell>
        <cell colName="ORACLE11I10_01">OracleId2</cell>
      </row>
        </rows>
     </table>
  </xref>
```

4 Put this file, AccountXref.xm,l under the <SOA server install directory>\integration\esb\bin directory.

Next, run xrefimport on this file to create a mapping between Siebel Trade Promotion Management and Oracle Trade Management accounts.

5 On windows: Navigate to the Command Prompt.

On linux: Open a Shell window.

6 Go to the <SOA server install directory>\integration\esb\bin directory.

7 Make sure that following variables are set correctly, before running the tool.

- CRMINTG_DB_URL <SOA database connection details>
- CRMINTG_DB_USER
- CRMINTG_DB_PASSWORD
- OC4J_USERNAME
- OC4J_PASSWORD
- CLASSPATH <SOA_HOME>/bpel/system/classes
- GUID_GENERATOR oracle.crmintg.common.xpath.CRMIntgGUIDGenerator

The values should point to the schema where Xref tables were created during Xref setup. Sample values are:

- DB_URL=jdbc:oracle:thin:@stapm21.us.oracle.com:1521:orcl
- DB_PASSWORD=oraesb
- DB_USER=oraesb

8 Run following command to import the above XML file using the ID-Xref import utility with the custom GUID generation option configured in CRMIntg custom GUID Generator setup-

- On Windows: xrefimport -file <import xml file name with full path> -generate COMMON

- On Linux: ./xrefimport.sh -file <import xml file name with full path> -generate COMMON

For example, ./xrefimport.sh -file AcoountXref.xml -generate COMMON

Follow similar steps for Product, Organization, and so on to create corresponding mappings between Siebel Trade Promotion Management and Oracle Trade Management data. Details on mapping Oracle Trade Management and Siebel Trade Promotion Management Organizations are explained later in Sections Setting Up Common Objects and Creating Siebel Trade Promotion Management Business Units and Price List Data Mapped to Oracle Trade Management.

A sample file:

```
<xref xmlns="http://xmlns.oracle.com/xref">
  <table name="ORGANIZATION">
      <columns>
         <column name="SIEBEL78_01"/>
         <column name="ORACLE11I10_01"/>
       </columns>
      <rows>
         <row>
            <cell colName="SIEBEL78_01">42-4YGUO</cell>
            <cell colName="ORACLE11I10_01">888</cell>
         </row>
         <row>
            <cell colName="SIEBEL78_01">42-4YGUI</cell>
            <cell colName="ORACLE11I10_01">911</cell>
         </row>
         <row>
            <cell colName="SIEBEL78_01">42-4YGUB</cell>
            <cell colName="ORACLE11I10_01">204</cell>
         </row>
         <row>
            <cell colName="SIEBEL78_01">42-4YGUU</cell>
            <cell colName="ORACLE11I10_01">207</cell>
         </row>
      </rows>
```

```
    </table>
  </xref>
```

Setting Up Common Objects

Use the following procedure to set up common objects.

To set up common objects

1. Copy the <Build Location>\SEBLTPMIntegPkEBSTM\xmllib\SEBLTPMIntegPkEBSTM folder to the <SOA_HOME>/bpel/system/xmllib directory.
2. Restart SOA.

Creating Siebel Trade Promotion Management Business Units and Price List Data Mapped to Oracle Trade Management

You must create Business Units and Price Lists in Siebel Trade Promotion Management for every Operating Unit (OU) in Oracle Trade Management. This is a manual task, and at this point no scripted or automated mechanism exists to pre-populate this into Siebel Trade Promotion Management.

To create and map Siebel Trade Promotion Management Business Units and Price Lists to Oracle Trade Management

1. For every operating unit (Organization) in Oracle Trade Management, gather the following information:
   - Name, ID, and Code
   - Location
   - Address
   - Name and ID of an Oracle Trade Management Responsibility that has this OU assigned as the Default.
   - Name and ID of a Oracle Apps User to which this responsibility is assigned.
2. In Siebel Trade Promotion Management, create business units corresponding to every one of the Oracle Trade Management OUs. Note the Siebel Trade Promotion Management IDs for the following:
   a. Log in to Siebel Callcenter Client, navigate to Site Map > Administration > Group/Organizations
   b. Click New in the Organizations applet.
   c. Enter the exact name as in Oracle Trade Management and save.

d Highlight the record and then select Help > About Record to check the row number. Use this row number for Siebel value ID Xref of ORGANIZATION.

e Follow the above steps for the other Oracle Trade Management operating units.

3 In Siebel Trade Promotion Management, create price lists corresponding to every one of the Oracle Trade Management OUs. Note the Siebel Trade Promotion Management IDs for the following:

a Log in to Siebel eConsumer Sector, navigate to Site Map > Administration > Pricing > Price Lists

b Click New in the My Price List applet.

c Enter the exact name as in the Oracle E-Business Suite Price List and Save.

d Highlight the record and then choose Help > About Record from the menu to check the Row Id of Siebel Trade Promotion Management Price List. Use this Row Id for Siebel Trade Promotion Management value ID Xref of PRICE LIST.

Populating Mappings in ID-Xrefs and DVMs

Using the information created in the previous step, populate the following ID-Xrefs with the mappings between the Oracle Trade Management ID and the Siebel Trade Promotion Management ID.

- ID-Xref: ORGANIZATION
  - This ID-Xref stores the mappings between Oracle Trade Management Operating Units (ORGANIZATION) and Siebel Trade Promotion Management Business Units.
  - This ID-Xref has three columns. ORACLE11I10_01, SIEBEL78_01 and COMMON
  - Create an XML file conforming to the Xref data import utility schema. This file has a row for every Oracle Trade Management-Siebel Trade Promotion Management mapping, between Organization and Business Units. The Oracle Trade Management ID (in ORACLE11I10_01 column) has the ORGANIZATION_ID, while the Siebel Trade Promotion Management ID (in SIEBEL78_01 column) has the Business Unit ID.
  - Import the above XML file using the ID-Xref import utility with the common-id generation option. See Populating Xref Data for instructions.
- ID-Xref: PRICE LIST
  - This ID-Xref stores the mappings between Oracle Trade Management and Siebel Trade Promotion Management Price List.
  - This ID-Xref has three columns: ORACLE11I10_01, COMMON, and SIEBELSIA80_01.
  - Create an XML file conforming to the Xref data import utility schema. This file has a row for every Oracle Trade Management-Siebel Trade Promotion Management mapping, between price list. The Oracle Trade Management ID (in ORACLE11I10_01 column) has the PRICE_LIST_ID (Query in Oracle APPS schema; for example, "select price_list_id from qp_price_lists_v where name = 'Corporate';), while the Siebel Trade Promotion Management ID (in SIEBELSIA80_01 column) has the Row ID of price list.
  - Import the above XML file using the ID-Xref import utility with the common-id generation option.

Validating and Loading DVMs

This integration requires a number of other DVMs. These store various mappings between Oracle Trade Management and Siebel Trade Promotion Management lookup values. These are provided with sample data, and should each be verified for the specific integration scenario.

All DVM map xml files can be found in the following directory:

<Build Location>\SEBLTPMIntegPkEBSTM\SharedComponents\Utility\DVM\Maps

To upload DVM

1. Log in to ESB Control.
2. Click the icon on the top right hand corner.

   The Domain Value Map is displayed on the left panel.
3. Click Create and select Import a new map.
4. You must import the following DVM used by each module:

- Customer
  - STATE
  - COUNTRY
  - GENDER
  - DEFAULT ORG: After importing this DVM map, please change the Siebel Trade Promotion Management column value according to the setup in Siebel. The value in this DVM map is just a sample.
  - PERSONAL TITLE
  - ACCOUNT STATUS
  - CONTACT STATUS
  - ADDRESS STATUS
  - PHONE TYPE CODE
  - WEB TYPE CODE
  - ADDRESS TYPE CODE
  - CUSTOMER TYPE
  - HOME OWNER FLAG
  - MARITAL STATUS
- Product
  - PRODUCT STATUS
  - UNIT OF MEASURE
- Fund

- BUDGET TYPE
- ACCRUAL BASIS TYPE
- CURRENCY CODE

- Deduction
  - CLAIM STATUS
  - DEDUCTION REASON
  - DEDUCTION TYPE
  - PAYMENT METHOD TYPE
  - CURRENCY CODE
- Promotion
  - CURRENCY CODE
  - PROMOTION STATUS
  - PROMOTION TYPE
  - DISCOUNT TYPE

Process of Deploying BPEL Processes Using Oracle JDeveloper

To deploy BPEL processes using Oracle JDeveloper, perform the following tasks:

1. Configuring the Application Server on page 148
2. Configuring the Integration Server on page 149
3. Deploying BPEL Processes for Siebel CRM Integration Pack for Trade Promotion Management on page 149

Configuring the Application Server

Use this procedure to configure the application server.

To configure the application server

1. Open Oracle JDeveloper.
2. Click Connections Navigator.
3. Under Connections, double-click 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 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 the test is successful, a confirmation message is displayed.

Configuring the Integration Server

To configure the integration server

1 Open Oracle JDeveloper.

2 Click Connections Navigator.

3 Under Connections, double-click 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 previous step.

8 Change the port name, as needed, to indicate the port at which the SOA Suite instance runs.

9 Click Next.

10 Click Test Connection.

If the test is successful, a confirmation message is displayed.

Deploying BPEL Processes for Siebel CRM Integration Pack for Trade Promotion Management

The final step is to deploy the BPEL processes. A number of BPEL processes exist for every module. The list of all BPEL processes to be deployed follows. The processes are ordered according to the recommended sequence of deployment:

1 CRMIntegErrorHandlerService
2 CRMIntegMapAccountCOMToKeyCrossRefSync
3 CRMIntegMapAccountCOMToSEBL8Sync
4 CRMIntegMapAccountSEBL8ToKeyCrossRefSync
5 CRMIntegXformAcctEBS11i10ToCOM
6 CRMIntegXformEBSToSEBLAndSyncAcct
7 CRMIntegSaveAcctEBS11i10ToSEBL782Sync
8 CSIntegMapSimpleProductCOMToSEBL80
9 CRMIntegXformProductOPOraToComEBS11i10ToSEBL782
10 CSIntegSimpleProductEBSToSEBL80Sync
11 CRMIntegSyncProductOPEBS11i10ToSEBL782Async
12 CRMIntegSubscribeToCreateProductOPEBS11i10ToSEBL782
13 CRMIntegSubscribeToUpdateProductOPEBS11i10ToSEBL782
14 CRMIntegMapPromotionCOMToSEBL80Inboundsync
15 CRMIntegMapPromotionCOMToSEBL80OutboundSync
16 CRMIntegMapPromotionSEBL80ToCOMInboundsync
17 CRMIntegMapPromotionSEBL80ToCOMOutboundSync
18 CRMIntegPromotionCOMToEBS11i10Sync
19 CRMIntegUpdatePromotionCOMToSEBL80Sync
20 CRMIntegUpsertPromotionSEBL80ToEBS11i10Sync
21 CRMIntegFundCOMToEBS11i10Sync
22 CRMIntegMapFundCOMToSEBL80InboundSync
23 CRMIntegMapFundCOMToSEBL80OutboundSync
24 CRMIntegMapFundSEBL80ToCOMInboundSync
25 CRMIntegMapFundSEBL80ToCOMOutboundSync
26 CRMIntegUpdateFundCOMToSEBL80Sync
27 CRMIntegUpsertFundSEBL80ToEBS11i10Sync
28 CRMIntegAccrualEBS11i10ToSEBL80Sync
29 CRMIntegDeductionCOMToEBS11i10Sync
30 CRMIntegMapDeductionCOMToSEBL80InboundSync
31 CRMIntegMapDeductionCOMToSEBL80OutboundSync
32 CRMIntegMapDeductionSEBL80ToCOMInboundSync
33 CRMIntegMapDeductionSEBL80ToCOMOutboundSync

34 CRMIntegUpsertDeductionCOMToSEBL80Sync

35 CRMIntegUpsertDeductionSEBL80ToEBS11i10Sync

36 CRMIntegDeductionEBS11i10ToSEBL80Sync

To deploy BPEL processes

1 Launch Oracle JDeveloper.

2 In Oracle JDeveloper, select File > New > Application.

3 Click OK to continue.

4 Enter a meaningful application name e.g BPELDeployer.

A single application can have all the projects or multiple applications can be created for each module.

5 Click OK to continue.

6 When prompted to create a project, click Cancel.

7 In the Applications Navigator, right-click on the BPELDeployer application and select Add to BPELDeployer.jws.

8 Browse to <Build location>\SEBLTPMIntegPkEBSTM\BusinessProcesses\CommonServices\CRMIntegErrorHandler Service.

a Select CRMIntegErrorHandlerService.jpr.

b Click Open.

This brings one process into the workspace. In the same way, bring all the processes from the <Build location>\SEBLTPMIntegPkEBSTM\BusinessProcesses folders (Customer, Deductions, Promotions, Products), into the workspace. Now they are ready for deployment.

9 Deploy the process in the order specified above for each module.

NOTE: This fails if the BPEL PM Server has not been started.

a Right click each project name in the workspace BPELDeployer.jws.

b Select Deploy > LocalBPELServer (Integration server connection name) > Deploy to default domain.

c Enter a password for BPEL server.

d If the Deploy Properties window is displayed, click OK to overwrite the current version.

e Verify that a successful deployment message appears in the lower left portion of the JDeveloper window (Apache int log).

f Ignore any compilation warnings.

Repeat Steps 9a to 9f for all the projects added to BPELDeployer.jws.

Synchronizing Records after the Oracle Server Has Gone Down

If the Oracle server goes down, you can synchronize records between Siebel Trade Promotion Management and Oracle Trade Management from either application. This section contains the following topics:

- Synchronizing Records from Siebel Trade Promotion Management on page 152
- Synchronizing Records from Oracle Trade Management on page 157

Synchronizing Records from Siebel Trade Promotion Management

If the Oracle server is down when a user adds or modifies a record in Siebel Trade Promotion Management, then Siebel CRM Integration Pack for Trade Promotion Management cannot synchronize this entry with Oracle Trade Management. Therefore the integration provides ways for the administrator to resend the data from Siebel Trade Promotion Management to Oracle Trade Management after the Oracle server comes up. This section discusses two ways to resend data:

- Sending Siebel Data with the User Interface on page 152
- Using Workflow to Send Data Through the Database Layer on page 153

This section uses the Fund module as an example, but you can use the same approach for other modules, such as Promotion.

Sending Siebel Data with the User Interface

To send Siebel data through the user interface

1 Within BC: CS Account Fund, add a BC user property as the following table shows.

Name	Value
Named Method 1	"SendFundData", "INVOKESVC", "CS Account Fund", "Workflow Process Manager", "RunProcess", "'ProcessName'", "CSIntegSEBLSIAFundUpsertOutboundFlow", "'RowId'", "[Id]"

2 Within applet: CS Fund Admin List Applet, expose a new button for sending a record on CS Fund Admin List Applet by defining Control as the following table shows.

Name	Caption	HTML Type	Method Invoked
SendFundUpdate	Send	MiniButton	SendFundData

The button is enabled for all the funds with status Completed.

3 Add a new applet user property as the following table shows.

Name	Value
CanInvokeMethod: SendFundData	[Read Only Condition Field]

4 Compile the modified objects.

5 If you do not want to expose the button to all users, then do the following:

a Create a new view + clone of CS Fund Admin List Applet with the button.

b Add the new view to the desired responsibility.

Using Workflow to Send Data Through the Database Layer

You can create a workflow policy object and columns to identify columns to monitor in the Siebel database or extension columns. Configure each module as follows to enable a database trigger to send data from Siebel Trade Promotion Management to Oracle Trade Management.

Configuring a Workflow Policy Column

Workflow Policy Column identifies a column to monitor from the Siebel database or extension columns.

To configure a workflow policy column

1 Login to Siebel Tools.

2 Navigate to Project.

3 Query for CS CG Fund Integration project.

4 Select the Locked checkbox to lock the project.

5 Navigate to Workflow Policy Column.

6 Query for Fund Group Status.

7 Lock Object from the R-popup menu.

8 Edit the object as the following table shows.

New?	Name	Table Name	Column Name	Comments
Modified	Fund Group Status	S_MDF	STATUS_CD	Change Picklist from "PickList Deduction Payment Status" to "PickList CS Fund Group Status". Remove Pick Applet "CPG Deduction Payment Status Pick Applet".
New	Fund Type	S_MDF	FUND_CD	None

Configuring a Workflow Policy Object

A workflow policy object groups workflow policy component columns that can be monitored in the same workflow policy. Use this procedure to configure the workflow policy object.

To configure a workflow policy object

1. Navigate to Workflow Policy Object.
2. Create an object with Name = CS Account Fund.
3. Navigate to Workflow Policy Component.
4. Create a workplace policy component as follows:
   - Name = CS Account Fund
   - Source Table = S_MDF
5. Navigate to Workflow Policy Component Col.
6. Add component columns as the following table shows.

#	Name	Source Table Name	Source Column Name
1	Fund Group Status	S_MDF	STATUS_CD
2	Fund Type	S_MDF	FUND_CD

7. Shut down Siebel Server.
8. Compile the locked projects into the server srf file.

Enabling Workflow Policy and Creating Actions

To make Siebel Tools objects, such as workflow policy objects and columns, accessible in Siebel Client, you must update Siebel Repository in the Siebel database. Workflow policy objects and columns are read from Siebel Repository, not from the compiled Siebel Repository file (.srf). You can connect to the Siebel application database using Siebel Tools and import workflow policy objects and columns. Use the following procedure to enable the workflow policy object.

To enable workflow policy and create actions

1. Login to the Siebel eConsumersector application.
2. Navigate to Administration - Business Process > Workflow Policy Actions.
3. Use the following table to create a new action for the workflow.

Name	Program	Workflow Object
CS Account Fund	Run Workflow Process	CS Account Fund

4 Use the following table to create an argument for the action.

Argument Name	Value
ProcessName	CSIntegSEBLSIAFundUpsertOutboundFlow

5 Navigate to Administration - Business Process > Workflow Policy Groups.

6 Use the following table to create a new workflow policy that defines conditions and generates database triggers to capture updates.

Policy	Workflow Object	Workflow Policy Group	Batch Mode	Units	Duration
CS Account Fund	CS Account Fund	CS Account Fund	Y	Days	1

7 Use the following table to create a condition for this workflow.

Condition Field	Operation	Value
Fund Group Status	=	Completed
Fund Type	=	Account Fund

8 Use the following table to create an action for this workflow.

Action	Sequence
CS Account Fund	1

9 Use the following table to create the argument for this action.

Argument	Value
ProcessName	CSIntegSEBLSIAFundUpsertOutboundFlow

Generating Triggers

With the Generate Trigger (GenTrig) component on the Siebel Server, you can crete database triggers. Policy Manager uses these database triggers to identify which records may match policy conditions. You must regenerate Generate Trigger whenever new policies are created or deleted.

You can run the Generate Triggers component with either the Server Manager graphical user interface (GUI) or command line mode. Both the GUI and the command line use the same parameters.

To run Generate Triggers from the command line

1 Go to cmd.

2 Navigate to the Siebel Enterprise Server Installation>\siebsrvr\bin directory.

3 Type

```
Srvrmgr /g <gateway server name:port> /s <Siebel server name> /e <Enterprise name>
/u <username> / p <password> (Example: srvrmgr /g sdcp1952i028:4330 /s sdcp1952i028
/e siebel /u sadmin /p sadmin)
```

4 Press Enter to connect to the server manager.

5 Type

```
start task for comp gentrig with PrivUser='<Previledge Username>',PrivUserpass='<
Previledge User Password>', exec='True'

(Example: start task for comp gentrig with
PrivUser='siebel',PrivUserPass='db2',exec='true')
```

6 Press Enter to start the GenTrig task.

NOTE: You must have sufficient privilege to run the GenTrig task.

7 Type `list task for comp gentrig`

8 Press Enter to display the status of the task.

Running the Workflow Monitor

You must start Workflow Monitor Agent in order to execute your policies. Workflow Monitor Agent checks to see when the conditions of policies are met.

To run Workflow Monitor Agent from the command line

1 If you are not connected to the server manager, then do the following steps:

a Go to cmd.

b Go to the <Siebel Enterprise Server Installation>\siebsrvr\bin directory.

c Type

```
Srvrmgr /g <gateway server name:port> /s <Siebel server name> /e <Enterprise
name> /u <username> / p <password>

Example: srvrmgr /g sdcp1952i028:4330 /s sdcp1952i028 /e siebel /u sadmin /p
sadmin
```

d Press Enter to connect to the server manager.

e Type

```
start task for comp workmon with TableOwner=' <Table Owner> ', tableownpass='<
Table Owner Password >', Actionagent='false', Groupname=<Workflow Policy Group
Name>'
```

```
Example: start task for comp workmon with
TableOwner='smkrdev',tableownpass='smkrdev',Actionagent='false',
BatchMode='true', Groupname='CS Account Fund'
```

f Press Enter to start the WorkMon task.

2 Type

```
list task for comp workmon
```

3 Press Enter to display the status of the task.

Synchronizing Records from Oracle Trade Management

Oracle Trade Management has a procedure to update records after the Oracle server has gown down. After a connection is restored, the integration passes an error message asynchronously. The error message is part of a notification to the administrator that includes the process name, BPEL instance ID, and the text of the error message.

Generally, the message text stores error information in a table of entries under object type and object ID. For deductions, the object type is Deduction, and the object ID is DeductionID. Similarly for accruals, the object type is Accrual, and the object ID is UtilizationID.

A CC job, OZF-TM: Reprocess Accruals and Claims, resends the data, depending on the parameter that you specify provide.

The message reflects two processes:

- CRMIntegDeductionEBS11i10ToSEBL80Sync - Deduction Oracle To Siebel
- CRMIntegAccrualEBS11i10ToSEBL80Sync - Accrual Oracle To Siebel

To run the OZF-TM job

1 Navigate to Oracle Trade Management Administrator > Run > Request.

2 Select job OZF-TM: Reprocess Accruals and Claims.

3 Select the desired parameter:

a Deduction ID/Deduction for deductions

b Utilization ID/Accrual for accruals

c No parameter, the default, to process everything in the table

4 Submit the job request.

4 Integrations

This chapter describes the integration points in the Siebel CRM Integration Pack for Trade Promotion Management for the Oracle E-Business Suite. This product consists of the following integration points:

- Budget Integration on page 159
- Deduction to Resolution Integration on page 164
- Promotion-Deal Integration on page 165
- Product Integration on page 166
- Account Integration on page 166

Budget Integration

A trade fund is a named appropriation of money to be spent on promotions over a specific period of time for specific accounts and specific categories and products. The two types of funds are fixed and accrual. Fixed funds are fixed amounts of money allocated in a lump sum. Accrual funds are funds in which the amount of money is calculated based on product movement. Consumer goods companies spend millions of dollars in trade funds to promote growth and favorably impact the point of sale at retailers. Effectively facilitating the process by which trade funds are created and allocated to accounts is a critical success factor for any comprehensive CRM solution. The Siebel Trade Promotion Management and Oracle Trade Management-Oracle E-Business Suite integration supports this functional need by using the Siebel user interface to create, administer, and manage trade funds. The integration also leverages the connectivity of Oracle Trade Management to facilitate the flow of trade fund information to Oracle E-Business Suite to perform the necessary accounting transactions.

Creation of Fixed and Accrual Funds

All fixed funds, accrual funds, and related budgets created in Siebel Trade Promotion Management are imported into Oracle E-Business Suite when the budget status is changed to Complete in Siebel Trade Promotion Management. Only active budgets are imported into Oracle E-Business Suite because all approval related processes are managed within Siebel applications and have no interaction point with Oracle E-Business Suite.

Fund Allocation

The Siebel Funds module supports an infinite funds hierarchy. For example, a parent fund can have child funds, which in turn can have child funds. With this capability, marketing administrators can break up a large fund into smaller funds. Child funds are sent to Oracle Trade Management when the status on each individual child fund is changed to Complete.

Fund Grouping

Fund grouping is similar to fund allocation and involves creating a parent fund with the intent to distribute funds across customer accounts. In this case, a parent fund is created without a customer association, and then child funds and allocations are generated for the parent fund by specifying a distribution percent for each child fund. Further, each child fund is associated with a customer account.

In the case of a group fund, only the child fund details are imported into Oracle E-Business Suite both because the parent fund is not treated as an independent fund or budget and the child fund created by group funds does not carry any association with the parent fund. Child funds are sent to Oracle Trade Management when the status of each individual child fund is changed to Complete. The status field for child funds appears read-only on the fund group screen, and you must navigate to the account funds screen to change the status of individual account funds. Also, because multiple fund grouping records can have an interface at the same time, the integration provides for it.

Fund Updates

Siebel users can update or make changes to funds after they are active. Siebel administrative users can perform most of these changes, which have an impact on the functioning of the funds. Table 82 lists updates and changes that can occur in Siebel Trade Promotion Management and their impact on the integration. All updates listed are synchronously integrated with Oracle E-Business Suite to ensure accurate accrual calculations and posting to Oracle General Ledger.

Table 82. Updates and Changes in Siebel Trade Promotion Management and Their Impact on the Integration

Update in Siebel Trade Promotion Management	Action	Impacted Fields
Siebel users can change the account associated with a fund.	Oracle E-Business Suite internally updates the market eligibility on the budget based on the updates performed in Siebel Trade Promotion Management. No retroactivity in terms of customer or market eligibility adjustments is supported by Siebel Trade Promotion Management.	Market eligibility on the funds
Siebel users can change the source categories associated with a fund.	Oracle E-Business Suite internally updates the product eligibility on the budget based on the updates performed in Siebel Trade Promotion Management. No retroactivity in terms of product or product categories adjustment is supported by Siebel Trade Promotion Management.	Product eligibility on the funds
Siebel users cannot delete funds but can end-date them. In case of fund end-dating in Siebel Trade Promotion Management, Oracle E-Business Suite ensures that no active deals or promotions sourced from the funds exist at the time of end-dating.	An end date is added to or updated on funds so that they stop accruing.	No impact

Table 82. Updates and Changes in Siebel Trade Promotion Management and Their Impact on the Integration

Update in Siebel Trade Promotion Management	Action	Impacted Fields
Siebel users can modify the accrual rate or percent associated with a source category on live funds. Also users can change or edit the end date for source category items.	Oracle E-Business Suite internally updates the discount percent or amount and end date for discount lines on the accrual budget based on the updates performed in Siebel Trade Promotion Management. No retroactivity in terms of accrual rate adjustments is supported by Siebel Trade Promotion Management.	Discount rules table for accrual budgets
Siebel users can change the Organization associated with a fund.	No Action	No Impact
Siebel users can change or edit the basis end date for accrual funds.	Oracle E-Business Suite internally updates the end date on the accrual budgets based on the updates performed in Siebel Trade Promotion Management.	End date on accrual budget

Budget Mappings

Table 83 lists the mappings for fixed fund creation.

Table 83. Budget Mappings for Fixed Fund Creation

Attribute Name in Siebel Trade Promotion Management	Attribute Name in Oracle E-Business Suite
Account	Customer Account
Name	Budget Name
Type	Setup Type
Amount	Budget Amount
Organization	Operating Unit
Currency	Currency
Exchange Date	Exchange Date

Table 83. Budget Mappings for Fixed Fund Creation

Attribute Name in Siebel Trade Promotion Management	Attribute Name in Oracle E-Business Suite
Start Date	Budget Start Date
N/A	Category

Table 84 lists the mappings for accrual fund creation.

Table 84. Budget Mappings for Accrual Fund Creation

Attribute Name in Siebel Trade Promotion Management	Attribute Name in Oracle E-Business Suite
Account	Customer Account
Name	Budget Name
Type	Setup Type
Organization	Operating Unit
Basis Start Date	Budget Start Date
Basis End Date	Budget End Date
Currency	Currency
N/A	Accrue To
N/A	Accrual Basis
N/A	Discount Level
N/A	Liability Flag
N/A	Category
Source Category	Item Category for discount rules table
Source Product Id	Line Id
Start	Date From
End	Date To
Accrual Rate	Discount & Discount Type
Accrual Percent	Discount & Discount Type
N/A	Tier Type

Deduction to Resolution Integration

Oracle Trade Management passes deductions created in Oracle Receivables, manually or by lockbox, to Siebel Trade Promotion Management so that salespersons, sales managers, and customer sales representatives can research and resolve these deductions. In addition, all settlements for the deductions established in Siebel Trade Promotion Management are communicated back to Oracle Trade Management, which, in turn, passes the settlement document to Oracle Receivables or Oracle Payables based on the settlement method.

From the viewpoint of Oracle Trade Management, two main components are involved in the execution of this flow:

1. Deduction and subsequent receipt or adjustment export:
   - Exporting all new deductions to Siebel Trade Promotion Management
   - Exporting any changes or updates to deduction that occur in the Oracle Receivables system, such as the following:
     - Subsequent receipts
     - Subsequent adjustments
2. Resolution Import:
   - Importing a resolution document from Siebel Trade Promotion Management for the following items:
     - Credit Memo
     - Previous Open Credit
     - Check
     - Chargeback
     - Write Off
   - Importing deduction split details from Siebel Trade Promotion Management
   - Importing promotional accrual settlement details from Siebel Trade Promotion Management

Deduction Creation

All deductions that come into Oracle Trade Management from Oracle Receivables are exported into Siebel Trade Promotion Management. Oracle Trade Management internally generates values for various fields captured here in a way similar to how it does currently with some exceptions. However because only some values are exposed on the Siebel user interface, these are the only values that are exported to the Siebel application. Similarly all subsequent receipts, adjustments, and updates to deductions that occur in Oracle Receivables are exported to Siebel Trade Promotion Management on a real time basis.

Deduction and Claim Resolution

After you research the deductions in Siebel Trade Promotion Management, you initiate settlement of these deductions from that application. An import mechanism pulls resolution information from Siebel Trade Promotion Management into Oracle Trade Management. This import qualifies all claims and deductions that have a resolution of status Submitted for a feed into Oracle Trade Management. On receiving this feed, Oracle Trade Management internally triggers an update to its deductions, releases accruals if any are associated with the deduction, and coordinates the settlement document either with Oracle Receivables or Oracle Payables based on the resolution type. Deduction resolution requires and uses synchronous integration. Siebel Trade Promotion Management supports the following methods for deduction and claim resolution:

- Credit Memo Resolution: A user determines that a company owes money to a customer and indicates that a credit be generated for the customer. A credit memo resolution can result from a promotional or accrual payment, in which case the user also associates a promotion or fund with the resolution.
- Previous Open Credit Resolution: A user can query existing open credits and apply them to open deductions and indicate resolution by a previous open credit.
- Chargeback Resolution: A user determines that a deduction is invalid and indicates a chargeback be generated for a customer.
- Write Off: A user cannot associate the deduction with a valid justification but at the same time realizes that the claim amount is minimal and hence simply chooses to write off the deduction.

Promotion-Deal Integration

To achieve synchronization between Siebel Trade Promotion Management and Oracle Trade Management, Siebel CRM Integration Pack for Trade Promotion Management passes all customer deals from Siebel Trade Promotion Management to Oracle Trade Management. The integration also ensures that if a deal is updated, then the recall, deletion, or update of the deal in the Siebel Trade Promotion Management is also reflected in Oracle Trade Management.

The integration creates and updates the following deal types:

- Bill-Back Deal
- Off-Invoice Deal
- Fixed-Cost Deal

After Siebel Trade Promotion Management creates a deal, Oracle Trade Management creates a corresponding offer, and all promotional accruals are calculated against the offer from Oracle Trade Management. Upon calculation, the accruals are adjusted against the Oracle Trade Management Offer/Budget and corresponding Siebel Trade Promotion Management deal or fund. Accrual related information and all the shipment related information are passed back and made available to Siebel Trade Promotion Management.

Product Integration

The integration of a simple product within Siebel CRM Integration Pack for Trade Promotion Management has the following basic steps. Steps 1 through 4 occur in an Oracle BPEL business process flow, while steps 5 through 7 occur in a Siebel workflow process:

1. Query for a simple product from Oracle E-Business Suite.
2. Transform the product message object to a common message object (COM) for simple products (coProduct).
3. Transform the common message object to a Siebel message.
4. Invoke the Siebel web service to create or update the product in Siebel Trade Promotion Management.
5. Receive the Siebel product messages.
6. Map the Siebel product messages to the wrapper business service.
7. Invoke the Siebel ImpExp business service to create the product.

Figure 1 shows the synchronization flow for a simple product, as described in the preceding text of this paragraph.

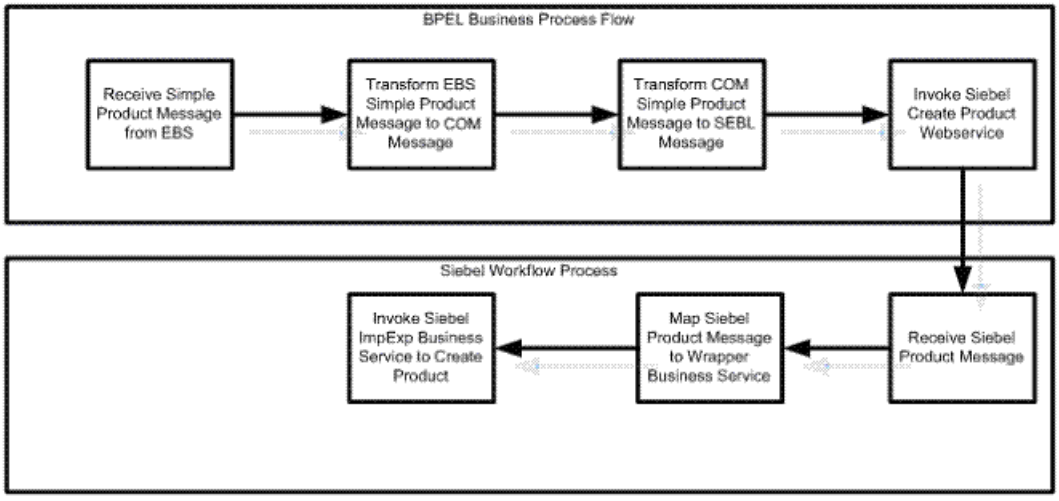

Figure 1. Synchronization Process Flow for a Simple Product

Account Integration

Whenever a new customer account is created within Oracle E-Business Suite, Siebel CRM Integration Pack for Trade Promotion Management initiates real-time synchronization between the related party-customer account in Oracle E-Business Suite and a new account in Siebel CRM applications.

All entities in the initial bulk load are synchronized with Siebel CRM so that users can transact against them in Siebel applications. Therefore, users can tie an opportunity or capture an order in Siebel CRM against a customer that was created in Oracle E-Business Suite. Similarly, new account sites and new account site are synchronized with Siebel applications when a new or existing party site (use) is associated with an account as an account site (use).

Updates to any supported customer entities in Oracle E-Business Suite are synchronized with Siebel CRM in real time.

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No index is available for this guide.