

**Siebel CRM Integration Pack for Oracle® Order
Management 2.3 - Release Notes**

Release 2.3

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Siebel CRM Integration Pack for Oracle Order Management 2.3 - Release Notes

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About Siebel CRM Integration Pack for Oracle Order Management 2.3 Preface

This preface discusses:

- Oracle release information publications
- Additional resources

Oracle Release Information Publications

This section discusses publications that provide in-depth technical and functional information about the Oracle products prior and immediately after their release.

1. Statement of Direction
2. Release Value Proposition
3. Release Content Document
4. About Document

Statement of Direction

The statement of direction is published six to nine months before a release. It provides a high-level overview of the major focus of product development efforts, enabling high-level business decision makers to begin preliminary upgrade planning.

Release Value Proposition

The release value proposition provides more functional details than the statement of direction, identifies major enhancements, and articulates the expected business benefit. This document is designed to help you determine whether new product features warrant upgrading from an old release, or embarking on a new implementation. With this information, you will be able to initiate preliminary budget planning and begin putting together a project team to further evaluate specific Oracle products. The release value proposition is published three to six months before a release.

Release Content Document

The Release Content Document provides a greater level of detail on new functionality than the Release Value Proposition. This added level of detail should enable project teams to answer the following questions:

- What out-of-the-box functionality will change?
- What customizations may be affected?
- How will an upgrade or new implementation affect other systems?

- How will these changes affect the organization?

After the project team has reviewed and analyzed the release content document, business decision makers should be in the position to determine whether to allocate budget and initiate implementation plans.

The Release Content Document is published approximately one month before a release.

About Document

The About Document contains release notes and is published at release. It validates the final scope of the release, and outlines the features and enhancements that are available with the release of each product, describing the finalized functional and technical details that will enable project teams to confirm budgets and complete implementation plans.

Additional Resources

There are many additional resources that will help your organization determine the affects of upgrading to this release.

Visit the Oracle Metalink website frequently to keep apprised of ongoing changes. This table lists the types of resources that are available on Oracle Metalink:

Resource	Navigation
User guides	Top Tech Docs > Online Documentation > Applications Knowledge Home > Oracle Applications > Integrations > Applications Integration Architecture
Data models	Top Tech Docs > Applications Electronic Technical Reference Manuals (eTRM)
Installation guides	Knowledge Home > Oracle Applications > Integrations > Applications Integration Architecture
Upgrade guides	Knowledge Home > Oracle Applications > Integrations > Applications Integration Architecture

For all other documentation, reference:

<http://www.oracle.com/technology/documentation/applications.html>

For Training opportunities, reference:

http://education.oracle.com/web_prod-plq-dad/plsql/show_desc.redirect?redir_type=3

About Siebel CRM Integration Pack for Oracle Order Management 2.3

This section provides an overview of the value proposition for the Siebel CRM Integration Pack for Oracle Order Management 2.3. It is a roadmap that is intended to help you assess the business benefits of Siebel CRM Integration Pack for Oracle Order Management 2.3 and plan your information technology (IT) projects and investments.

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

This RVP in any form, software or printed matter, contains proprietary information that is the exclusive property of Oracle Corporation.

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

Siebel CRM Integration Pack for Oracle Order Management 2.3 Value Proposition

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

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

Key features include:

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

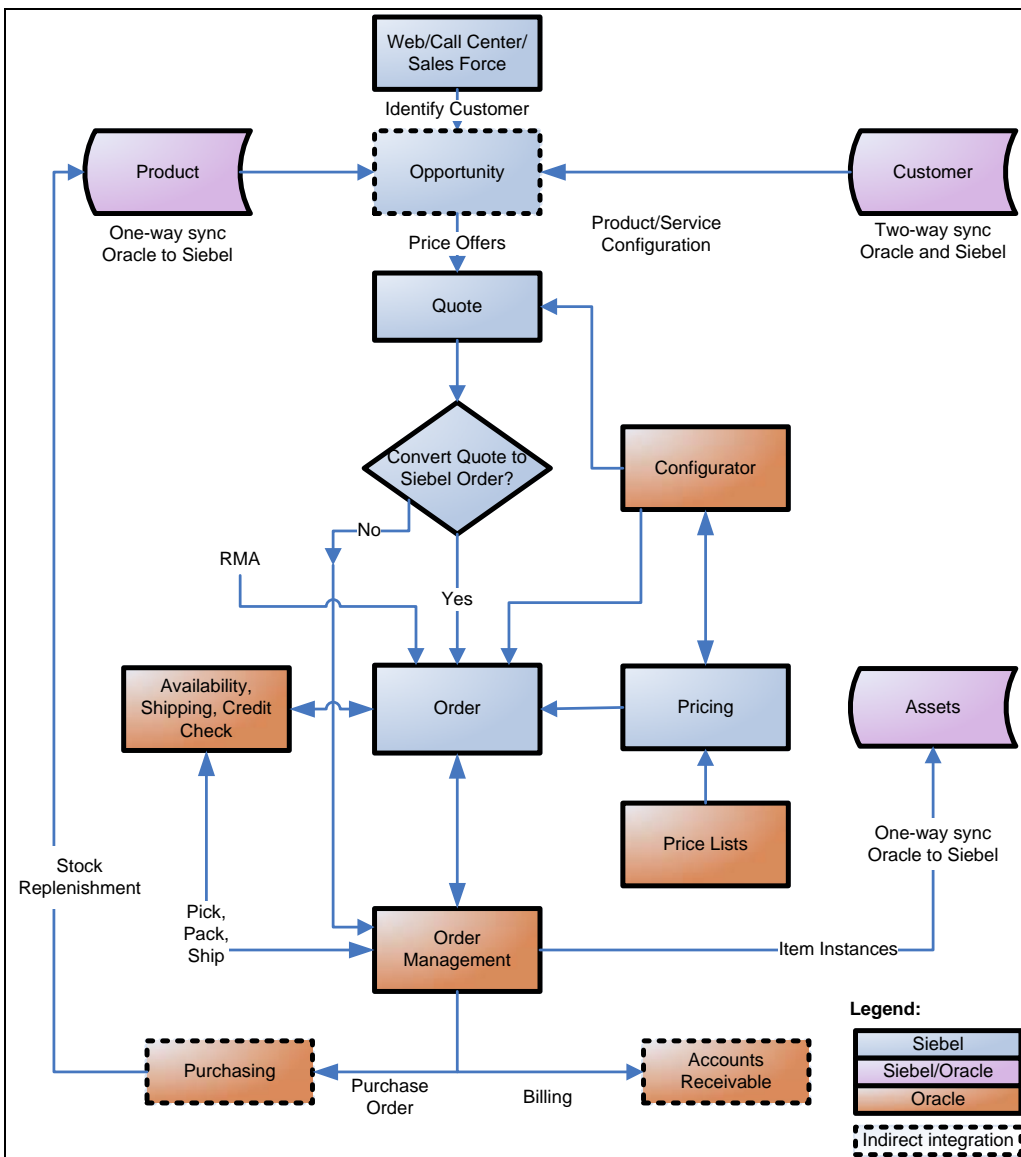
Key benefits include:

- Provides a complete campaign-to-cash business process.
- Reduced implementation costs with out-of-the-box maps and business processes.
- Enhanced customer visibility with status updates to Siebel from Oracle E-Business Suite (EBS).
- Increased efficiency for goods and services lifecycle management with support for different order types including RMAs.
- Decreases time to market for new products.
- Ensure consistent product and pricing definitions with product synchronization.
- Enhanced cross/up selling with best of breed Siebel Order Capture.
- Increase fulfillment and manufacturing efficiency with best of breed Oracle.
- Enables faster time to revenue.
- Reduced order errors through elimination of manual front to back office transformation.
- Faster order processing with call-outs to Oracle EBS Available to Promise, Shipping, Payments, and Credit Check.

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

Product Enhancements for Siebel CRM Integration Pack for Oracle Order Management

There are no functional enhancements planned as part of this release. We are only certifying against Siebel CRM 8.0.0.2 SIA and Oracle E-Business Suite R11.i.10 CU2. Siebel CRM Integration Pack for Oracle Order Management supports the order to cash business process as outlined in the following graphic:



Order to cash business process

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

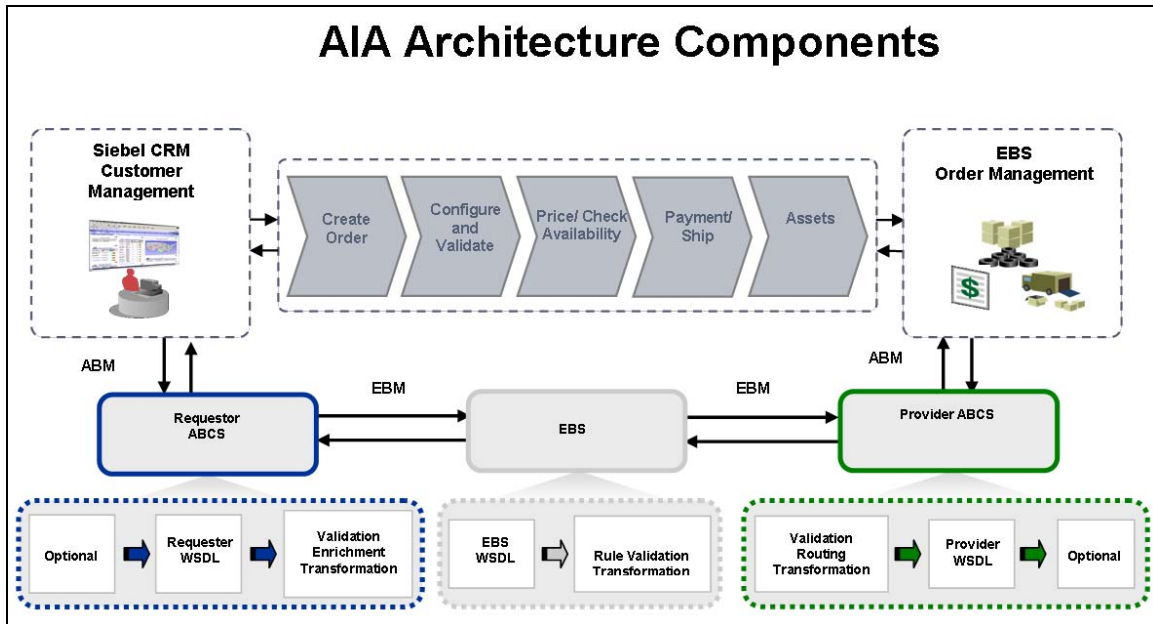
- Customer Initial Load, Update & Transactional Synchronization.
- Product Initial Load & Update Synchronization.
- Asset Initial Load, Transactional Synchronization.
- Price List Initial Load, Update Load.
- Quotes/Orders Transactional Synchronization.
- Check ATP.
- Get Shipping Cost.
- Perform Credit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

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

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

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

Siebel CRM Integration Pack for Oracle Order Management PIP is represented in the following high level architectural diagram:



High level architecture

The following Enterprise Business Objects are used by the Siebel CRM Integration to Oracle Order Management:

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

Siebel CRM Integration Pack for Oracle Order Management Features

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

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

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

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

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

This business process helps an organization:

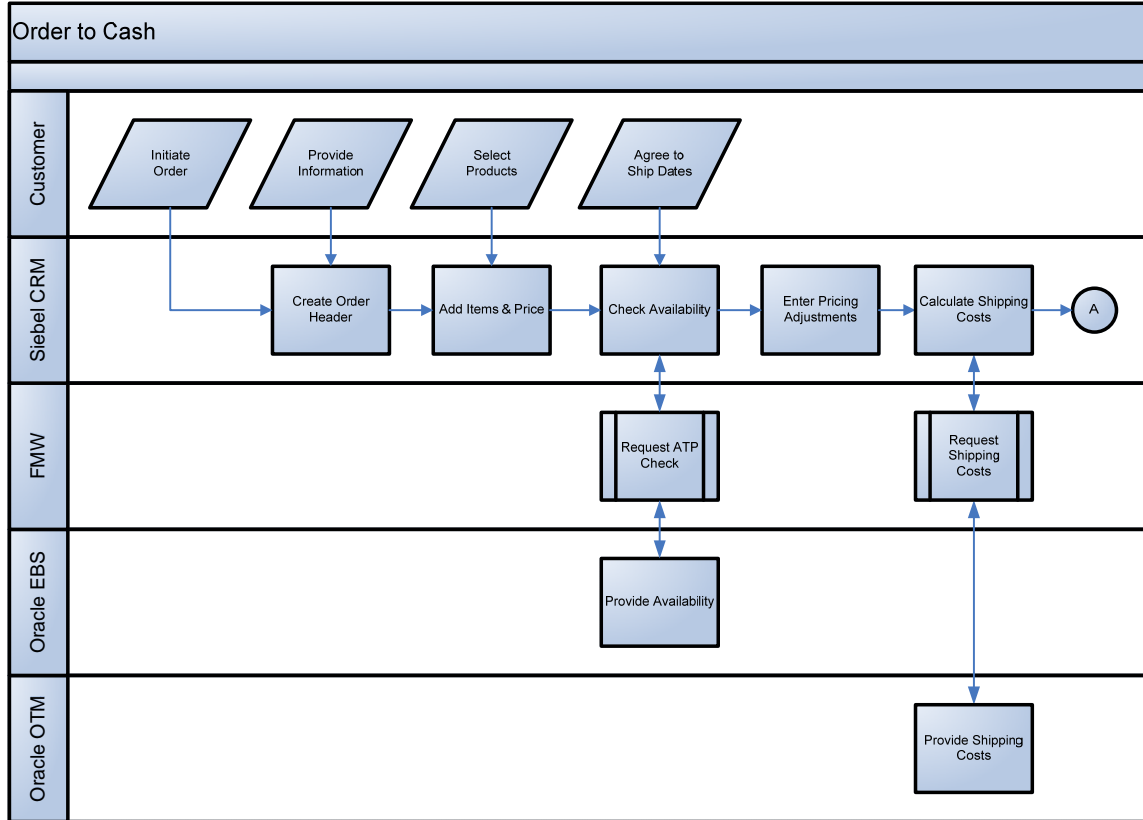
- Eliminate order fallout by making sure that products are correctly configured and available before the order is confirmed.
- Increase customer satisfaction by making sure that the order is priced correctly.
- Reduce customer callbacks by providing order availability and status.
- Decrease time to market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

The Order to Cash PIP consists of these integration flows:

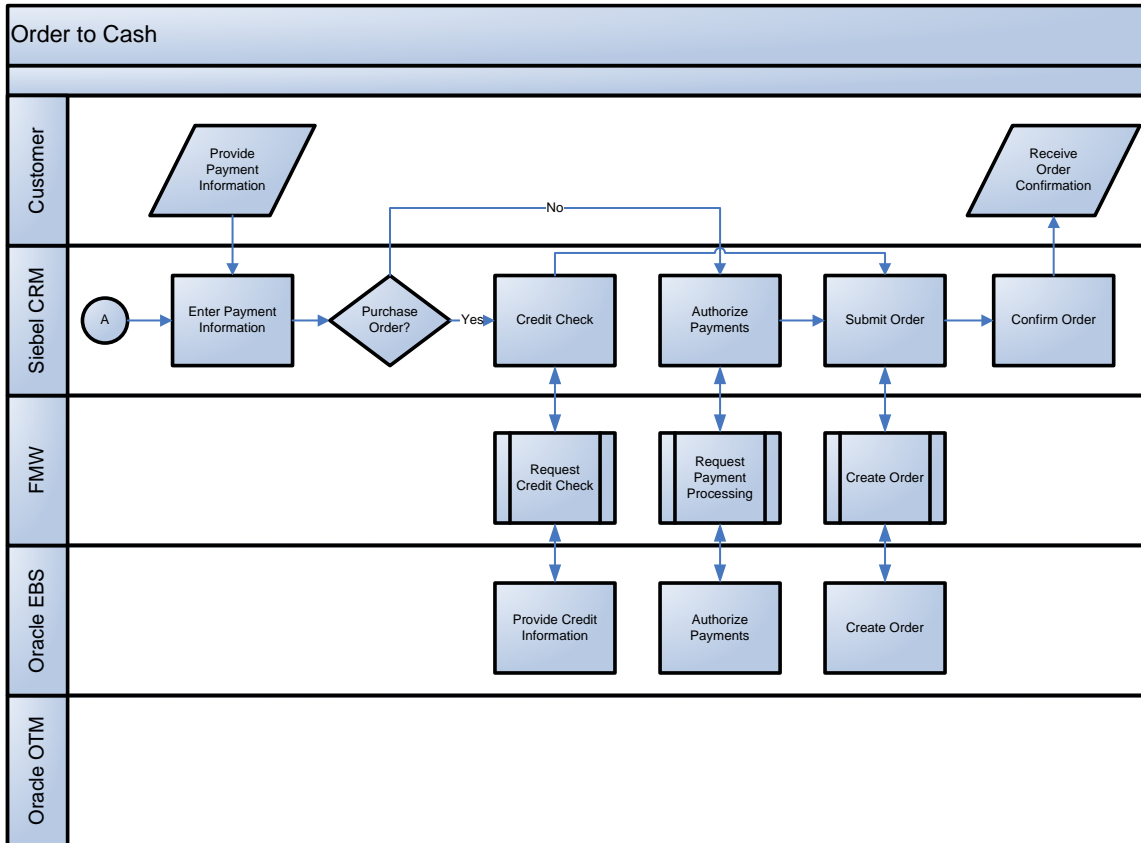
- Initial bulk data loading integration flows for Customers, Products, Price Lists, and Assets.
- Customer Management.
- Product Management.
- Price List Management.
- Process Integration for Quotes.
- Service calls: Available to Promise, Credit Check, Payment Authorization, and Shipping Charges.

- Order Management.
- Asset Management.

These diagrams illustrate the Order to Cash business process flow:



Order to Cash PIP business process flow (1 of 2)



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

Process Integration for Customer Management Features

The process integration flow for customer management:

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

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

- **Synchronize new customer accounts from Siebel CRM to Oracle EBS** enables the synchronization of new customer accounts from Siebel CRM to Oracle EBS as part of booking an order in the process integration for Order Management.
- **Update and synchronize customer accounts from Siebel CRM to Oracle EBS** enables the synchronization of customer updates from Siebel CRM to Oracle EBS if the record exists in both Siebel CRM and Oracle EBS. If a customer record that does not exist in Oracle EBS is updated, the customer record will not be synchronized to Oracle EBS.
- **Synchronize customer accounts from Oracle EBS to Siebel CRM** enables the synchronization of customer accounts from Oracle EBS to Siebel CRM. Whenever a new customer account is created in Oracle EBS, a real-time synchronization flow is initiated to synchronize the related party and customer account to a new Siebel customer account.
- **Merge accounts** maintains the transactional integrity essential to convert orders captured in Siebel CRM into booked orders, despite customer merge events that may occur within Oracle EBS. This flow is initiated in Oracle EBS when a customer account is merged into another customer account. The merge operation is then performed in Siebel CRM.
- **Merge parties** is initiated in Oracle EBS when an organization party is merged into another party. All of the child records that belong to the surviving party in the fulfillment system are synchronized to Siebel CRM after the merge.
- **Bulk load of customer data** enables the extract, transformation, and load of initial customer data from Oracle EBS to Siebel CRM. This feature uses Oracle Data Integrator (ODI) to extract relevant customer data from Oracle EBS, and load it to the appropriate Siebel CRM EIM tables, to be inserted into base tables. This process also enables cross-referencing between Oracle EBS and Siebel CRM.

Process Integration for Product Management Features

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

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

- **Synchronize Items** enables the synchronization of items from Oracle EBS to simple

products in Siebel CRM. This one-way feed from Oracle EBS to Siebel CRM is initiated by Oracle EBS to create or update an item from Oracle EBS to a simple product in Siebel CRM.

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

Process Integration for Price Lists Features

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

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

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

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

Process Integration for Quotes Features

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

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

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

Available to Promise Check Integration Flow Features

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

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

Shipping Charges Integration Flow Features

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

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

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

Credit Check Integration Flow Features

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

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

Payment Authorization Integration Flow Features

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

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

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

Process Integration for Order Management Features

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

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

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

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

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

Process Integration for Asset Management Features

Install base is synchronized to Siebel CRM as an asset.

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

- **Create assets** enables the synchronization of new customer-owned item instances from Oracle EBS to Siebel CRM Asset.
- **Update assets** enables the synchronization of updates to Item Instances from Oracle EBS to Siebel CRM Asset.
- **Bulk load of assets** enables the extraction, transformation, and loading of initial Item instance data from Oracle EBS to Siebel CRM Asset. This feature uses Oracle Data Integrator (ODI) to extract relevant data from Oracle EBS and map it to Siebel interface tables. This process also enables cross-referencing between Oracle EBS and Siebel CRM.

Oracle Configurator Features

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

Coexistence of AIA Process Integration Packs Features

Starting with AIA 2.3 release vehicle, multiple PIPs are bundled in a single AIA release. This gives customers an opportunity to deploy more than one PIP if so desired.

Examples of the PIPs that are bundled with AIA 2.3 are:

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

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

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

Note: Currently only O2C and Agile PLM co-existence is supported. Support for the coexistence of MDM PIPs with other PIPs will be enabled in the near future.