

Oracle Siebel CRM On Demand
Integration Pack for JD Edwards
EnterpriseOne (Opportunity to Cash)

An AMX International White Paper
January 2008

NOTE:

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INTRODUCTION

The Opportunity to Cash Integration Pack creates a seamless front and back office user experience by connecting Oracle Siebel CRM On Demand with the JD Edwards EnterpriseOne Suite at the data, business process, and user interface levels. Leveraging the best practices and methodology of Service Oriented Architecture, this pre-built integration combines the ease of use and rapid deployment capabilities and can be further extended to meet the unique requirements of the your organization.

This white paper will discuss the challenges of Oracle Siebel CRM On Demand integration development with JD Edwards EnterpriseOne and how these challenges can be mitigated with AMX International's pre-built Opportunity to Cash Integration Pack solution. It will outline how AMX International delivers Integration Solutions; all powered by Service Oriented Architecture, Oracle Fusion Middleware and JD Edwards EnterpriseOne tools.

By using key SOA principles, companies can more quickly and easily integrate Oracle Siebel CRM On Demand with applications into more valuable and flexible processes that can evolve with the business. It will also cover the technical details of the Opportunity to Cash Integration Solution.

CHALLENGES OF INTEGRATION

Thousands of companies are turning to Service Oriented Architecture to solve some of their biggest IT problems: integrating internal applications, reaching out to external partners, and supporting strategic business transformation.

JD Edwards EnterpriseOne customers are also vulnerable to the same concerns. Many of these concerns are related to how JD Edwards EnterpriseOne Suite could expose its data to other systems without losing its powerful business rules and flows, constraints, security and error handling features.

The Service Oriented Architecture is an excellent approach to overcome these integrations limitations. By leveraging the JD Edwards EnterpriseOne Web Service Gateway feature, standard and custom business functions, database tables, and list of values can be exposed to any external system as a web service.

SERVICE ORIENTED ARCHITECTURE

Service Oriented Architecture is an architectural style that guides all aspects of creating and using business processes, packaged as services, throughout their lifecycle, as well as defining and provisioning the IT infrastructure that allows different applications to exchange data and participate in business processes loosely coupled from the operating systems and programming languages underlying those applications.

SOA represents a model in which functionality is decomposed into small, distinct units (services), which can be distributed over a network and can be combined together and reused to create business applications. These services communicate with each other by passing data from one service to another, or by coordinating an activity between two or more services.

SOA major key principles are compliance to standards (both common and industry-specific), reusability, granularity, modularity, componentization and interoperability.



WEB SERVICE GATEWAY

Web Service Gateway is a framework that facilitates web services and basic integration capabilities. It is not a general integration hub, but a tool that produces and consumes JD Edwards EnterpriseOne services. Using WSG customers perform point-to-point integrations from one JD Edwards EnterpriseOne application to another, or from a JD Edwards EnterpriseOne application to any other product. WSG also provides the runtime for JD Edwards EnterpriseOne and JD Edwards World Integration Points (formerly known as XBPs). Following are some of the WSG features:

- Supports complex data structures by exposing service level interfaces, also known as Integration Points (such as ProcessSalesOrder), instead of the more granular business functions.
- Uses a graphical mapping tool that allows business logic to coordinate the granular business function calls into a single transaction. It also includes a rich vocabulary of the most common transform services, as well as support for EnterpriseOne-specific data transforms and cross-referencing services.
- Provides a service enablement tool to easily create web service interfaces described using WSDL. This tool invokes using SOAP over HTTP. It can also consume an external web service.
- Offers JD Edwards adapter to access to all established EnterpriseOne public interfaces like business functions, database operations for queries and for updates to staging tables, real time events, and XAPI events (such as asynchronous request responses from EnterpriseOne).
- Supplies a transport protocol to support multiple protocols and transports for external communication. The protocols are not limited to SOAP over HTTP, but also include XML over HTTP and HTTPS, FTP, e-mail, and JMS.
- Supports error handling and authentication.

ORACLE BUSINESS PROCESS EXECUTION LANGUAGE

Oracle BPEL Process Manager provides a comprehensive, standards-based and easy to use solution for creating, deploying, and managing cross-application business processes with both automated and human workflow steps. Oracle BPEL Process Manager provides the orchestration aspects for development.

With Oracle BPEL the state of long-running flows is automatically maintained in a database, ensuring that business processes can scale across multiple systems and that the processes can continue with no loss of process status or underlying data if an underlying system is disrupted.

Oracle BPEL Process Manager features a graphical and user-friendly Process Designer, a Web-based Console for management, administration, and debugging of deployed processes, making it easier for developers to modify and extend process integration packs.

KEY BENEFITS

With the Oracle Siebel CRM On Demand Integration Pack for JD Edwards EnterpriseOne Opportunity to Cash, your sales representatives will have a true 360 degree view of your customers, gaining better customer insight, resulting in more effective customer interactions, and productivity by providing consistent user interface for front and back-office information, increasing efficiency and effectiveness by reducing errors and re-work, and allowing sales agents to spend more time with customers.

When sales people need to create a new customer record or sales orders during their day-to-day activities, the Siebel CRM On Demand Opportunity to Cash Integration Pack allows these new records to be synchronized between the JD Edwards EnterpriseOne Suite and Oracle Siebel CRM On Demand in real time. It consolidates your customer, contact and product information.

PRE-REQUIREMENTS

JD Edwards EnterpriseOne Suite

JD Edwards EnterpriseOne toolset 8.95, 8.96, or 8.97

Oracle Siebel CRM On Demand

Web Service Gateway installed and configured (Server, adapters and drivers)

Oracle Business Process Execution Language (BPEL) installed and configured

OPPORTUNITY TO CASH INTEGRATION PACK FEATURES

The Opportunity to Cash Integration Pack allows sales representatives to generate sales orders from opportunity records created in Oracle Siebel CRM On Demand into JD Edwards EnterpriseOne Suite with a simple click action. It ensures consistent data across all applications by synchronizing customer, address, products, quotes and sales order information. The Integration Pack also comes with the ability to generate quote reports.

Requires minimal IT resource and maintenance and all these processes are performed in real execution time.

PRODUCT DATA SYNCHRONIZATION ASSUMPTIONS

The Siebel CRM On Demand Product Catalog and JD Edwards EnterpriseOne Suite Item Master are expected to be synchronized to enable the Oracle Siebel CRM On Demand opportunity product lines to be passed to JD Edwards EnterpriseOne Suite quoting. Product data are initially loaded into Siebel CRM On Demand using a bulk load. Subsequent changes or product additions in JD Edwards EnterpriseOne Suite are synchronized with Oracle Siebel CRM On Demand. All product information is maintained within JD Edwards EnterpriseOne Suite and synchronized with Oracle Siebel CRM On Demand.

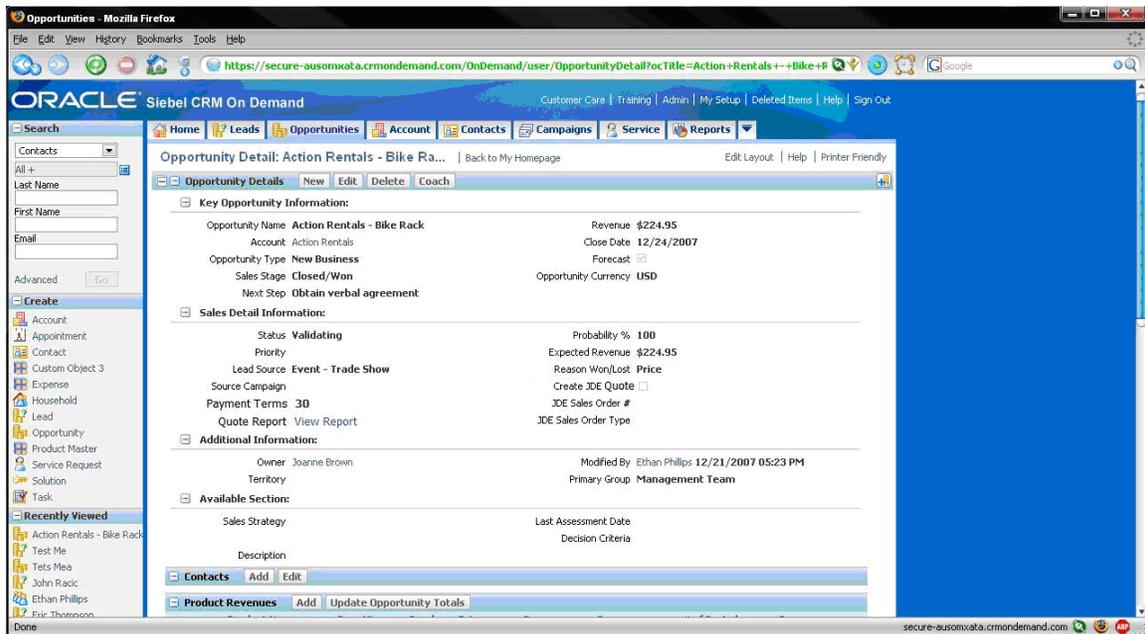


CUSTOMER DATA INTEGRATION

After the initial load of the Customer Data from JD Edwards EnterpriseOne Suite into Oracle Siebel CRM On Demand is complete, the customer records that exist in both applications are synchronized, so that data integrity is maintained. Customer data is synchronized whenever an existing customer record that exists in both applications is changed or when a new customer record is created in Oracle Siebel CRM On Demand.

HOW DOES THE INTEGRATION WORK?

When an Opportunity is created and becomes possible sales. A sales representative will click in the Create JDE Quote checkbox and the BPEL integration process is initialized. He or she also can generate a pre-quote report by clicking in the View Report link.



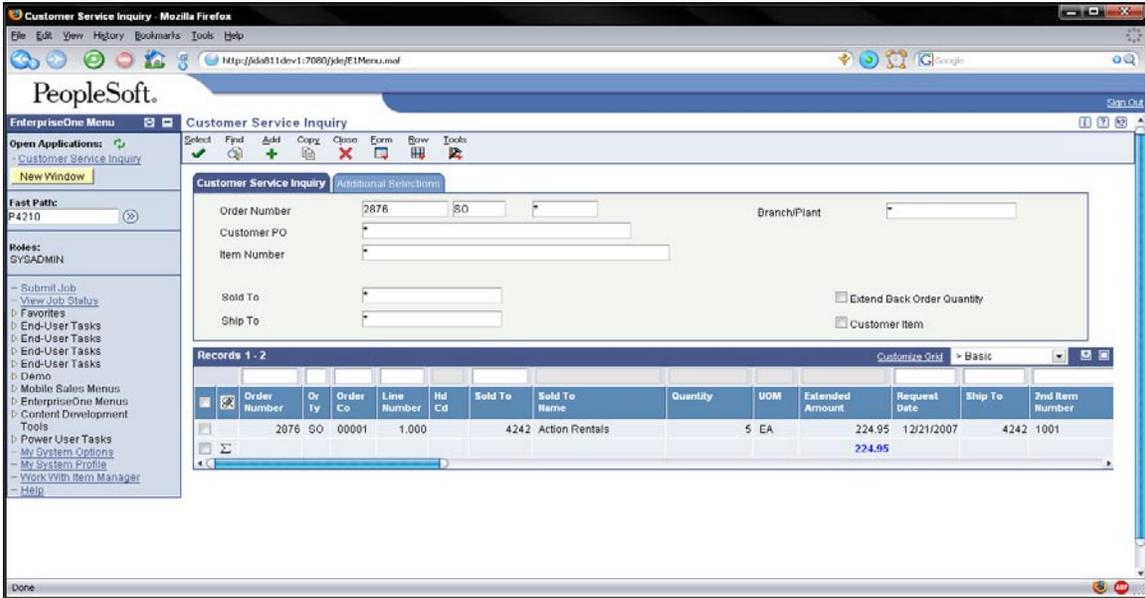
The screenshot displays the Oracle Siebel CRM On Demand interface in a Mozilla Firefox browser window. The page title is 'Opportunities - Mozilla Firefox' and the URL is 'https://secure-ausomxata.crmdemand.com/OnDemand/user/OpportunityDetail?ocTitle=Action+Rentals+-+Bike+Rack'. The interface shows the 'Opportunity Details' page for 'Action Rentals - Bike Rack'. The page is divided into several sections: 'Key Opportunity Information', 'Sales Detail Information', and 'Additional Information'. The 'Key Opportunity Information' section includes fields for Opportunity Name, Account, Opportunity Type, Sales Stage, Next Step, Revenue, Close Date, Forecast, and Opportunity Currency. The 'Sales Detail Information' section includes Status, Priority, Lead Source, Source Campaign, Payment Terms, Quote Report, Probability %, Expected Revenue, Reason Won/Lost, Create JDE Quote, JDE Sales Order #, and JDE Sales Order Type. The 'Additional Information' section includes Owner, Territory, Modified By, Primary Group, Sales Strategy, Last Assessment Date, and Decision Criteria. The 'Create JDE Quote' checkbox is visible in the 'Sales Detail Information' section. The 'View Report' link is also visible in the 'Quote Report' field.

Oracle Siebel CRM On Demand → Opportunities Tab → Create JDE Quote checkbox field

Oracle Siebel CRM On Demand → Opportunities Tab → View Report

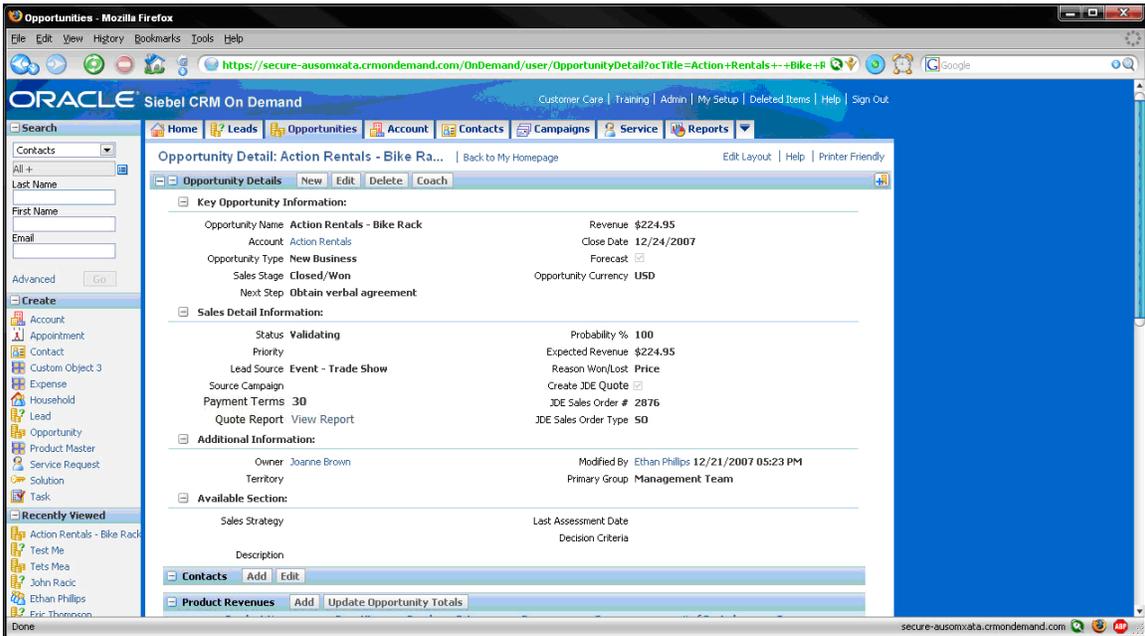
The BPEL integration process will send over to JD Edwards EnterpriseOne Suite all relevant data from the opportunity such as customer, address, products, prices, and discount among others to create a quote.

In JD Edwards Enterprise One Suite the sales department will analyze financial requirements and inventory data, add any changes or new information, and move the quote eventually to a sales order stage.



JD Edwards EnterpriseOne

With the sales order number and type, the BPEL integration process will return back and update the sales data into the specific Oracle Siebel CRM On Demand opportunity.



CUSTOMER 360° VIEW

In Oracle Siebel CRM On Demand sales representatives will be able to access all quotes, quote lists, sales order having a true Customer 360 view of all processes. This functionality will be provided through a link in Oracle Siebel CRM On Demand to a JD Edwards EnterpriseOne custom screen.

Business World : Transactions

You may select a particular transaction type to view a specific transaction history or click on List View button to see a complete list of business transactions.

Select

* Transaction Type: Campaigns [v] Go

Campaign Name	Schedule Name	Source Code	Start Date	End Date	Activity	Objective	Target Group
No data exists.							

Events

Name	Open Off	Event Type	Source Code	Start Date	End Date	Vendor	Invited	Registered	Attended	Contact
Vision Computers Expo 2002	No	Trade Show	JAMER02020003	01-JAN-2002	30-JUN-2004	DUPHY	Yes	No	No	Ray Adams
Vision Computers Expo 2002	No	Trade Show	JAMER02020003	01-JAN-2002	30-JUN-2004	DUPHY	Yes	No	No	Andre Beaulie
Vision Computers Expo 2002	No	Trade Show	JAMER02020003	01-JAN-2002	30-JUN-2004	DUPHY	Yes	No	No	Michelle Baker
Vision Computers Expo 2002	No	Trade Show	JAMER02020003	01-JAN-2002	30-JUN-2004	DUPHY	Yes	No	No	Lisa Branch
Vision Computers Expo 2002	No	Trade Show	JAMER02020003	01-JAN-2002	30-JUN-2004	DUPHY	Yes	No	No	Jim Yen

Quotes

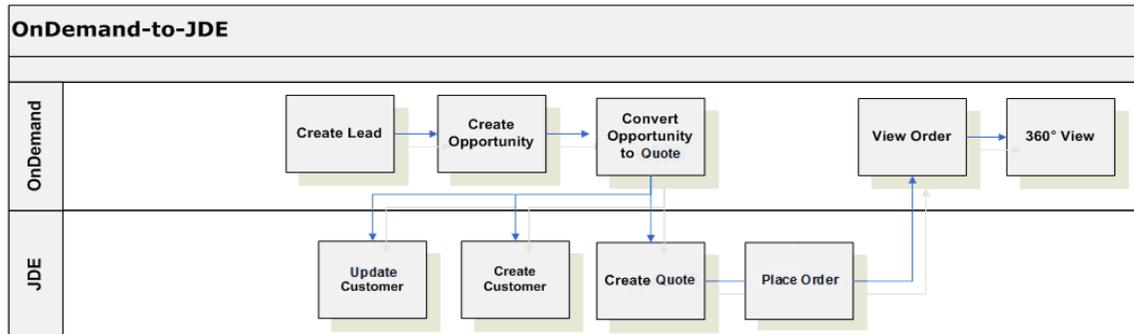
Account Number	Account Description	Quote Name	Quote Number	Contact Name	Status	Primary Subscreen	Creation Date	Amount
1608	Business World	Inv Oppy-2-Quote	6524		Draft	Jones, Mrs. Lisa	21-NOV-2006	16,707.65 USD
4429	Business World	Inv Oppy-2-Quote	6524		Draft	Jones, Mrs. Lisa	21-NOV-2006	16,707.65 USD
1608	Business World	Inv Oppy-2-Quote	6523		Draft	Jones, Mrs. Lisa	21-NOV-2006	16,707.65 USD
4429	Business World	Inv Oppy-2-Quote	6523		Draft	Jones, Mrs. Lisa	21-NOV-2006	16,707.65 USD
1608	Business World	Inv Oppy-2-Quote	6522		Draft	Jones, Mrs. Lisa	21-NOV-2006	16,707.65 USD

Orders

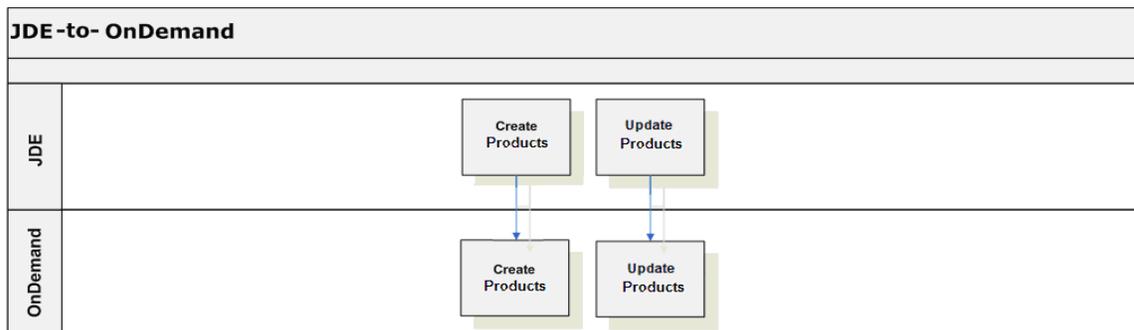
Account Number	Customer Name	Sales Order	Customer PO	Order Type	Category	Date Ordered	Requested Ship Date	Status
1608	Business World	51154		Order Only	Order	02-APR-2002	02-APR-2002	Closed
1608	Business World	51160		Order Only	Order	02-APR-2002	02-APR-2002	Closed
1608	Business World	10638		Web	Mixed	02-APR-2002	02-APR-2002	Closed
1608	Business World	10666		Web	Mixed	04-APR-2002	04-APR-2002	Closed
1608	Business World	51672		Order Only	Order	03-APR-2002	03-APR-2002	Closed

OPPORTUNITY TO CASH INTEGRATION PACK FLOWS

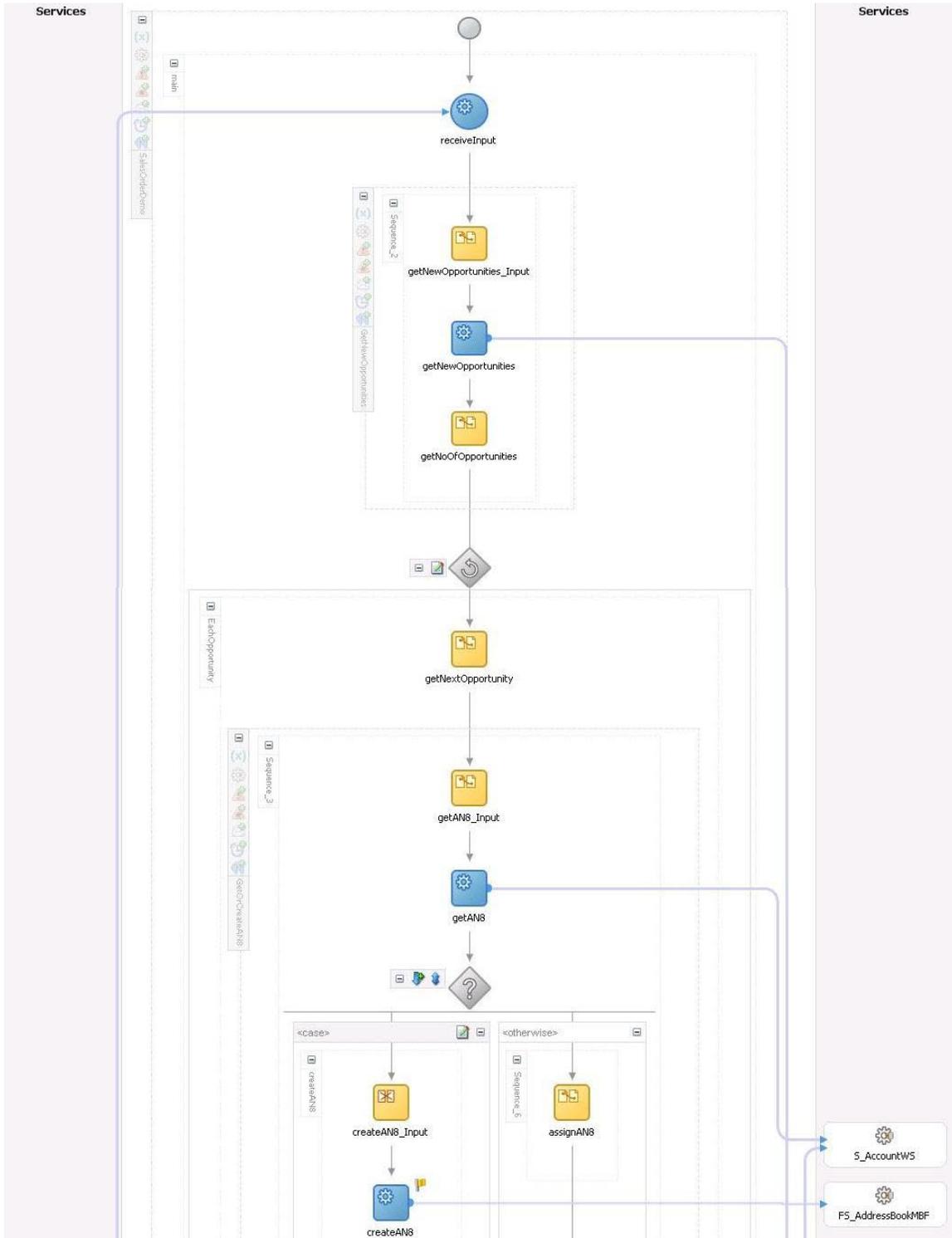
Quote

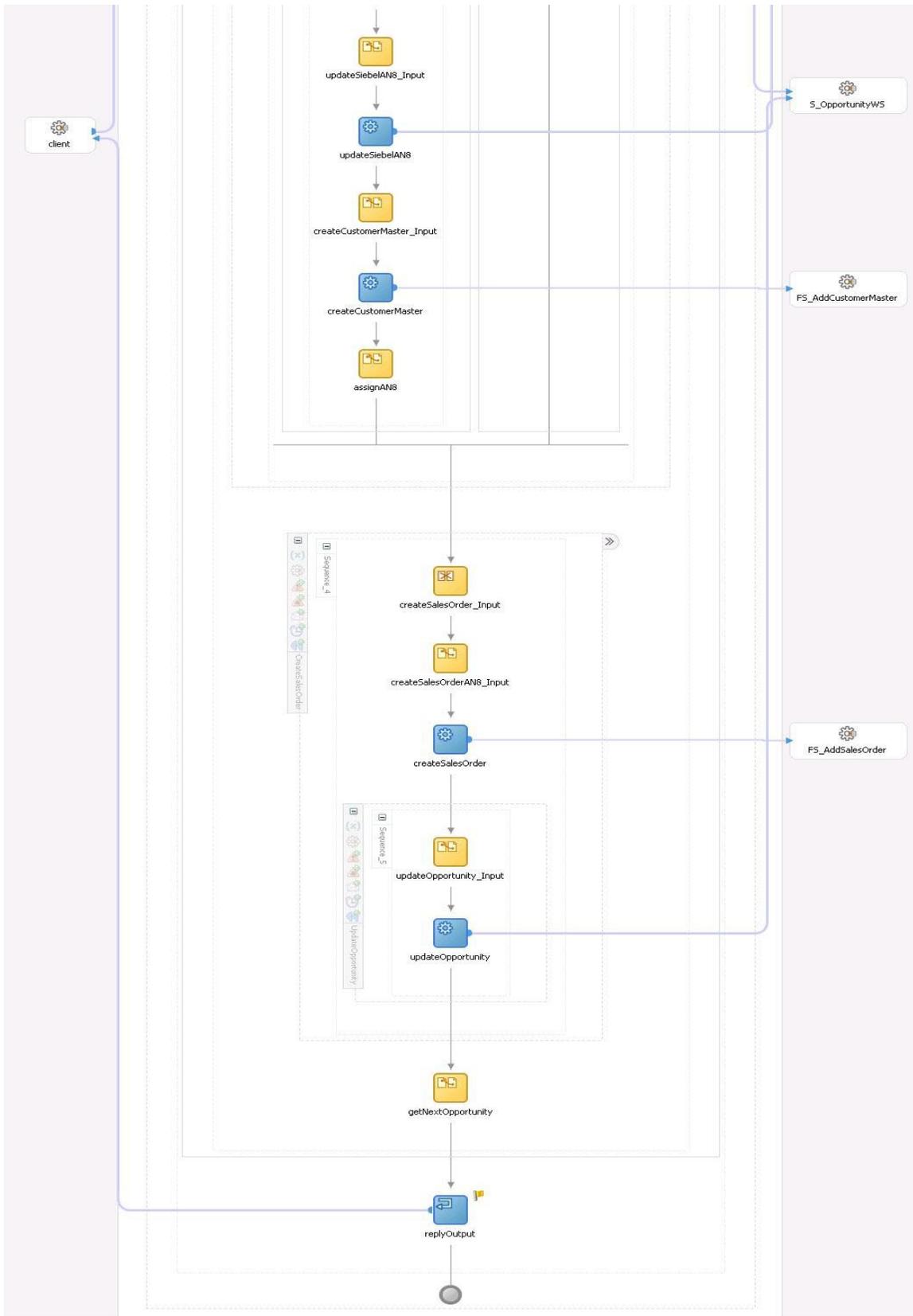


Products



OPPORTUNITY TO CASH INTEGRATION PACK BUSINESS PROCESS AND DESIGN





Graphical Development of Business Processes in BPEL

- Initial data load from JD Edwards EnterpriseOne into Oracle Siebel CRM On Demand for Products and Descriptions.
- Initial data load from JD Edwards EnterpriseOne into Oracle Siebel CRM On Demand for Customer and Contacts.
- The BPEL Integration Process waits for quotes to be created into JD Edwards Enterprise One Suite.
- The BPEL Integration Process synchronizes or creates new customer and address data into JD Edwards Enterprise One.
- The BPEL Integration Process updates quote status into Oracle Siebel CRM On Demand.
- The BPEL Integration Process waits for sales order number and type from JD Edwards Enterprise One.
- The BPEL Integration Process returns sales data to Oracle Siebel CRM On Demand.

SUMMARY

Leveraging AMX's experience and well-known knowledge in Oracle Siebel CRM On Demand and JD Edwards, the AMX's Opportunity to Cash Integration Pack provides everything you need to implement sustainable integrations between Oracle Siebel CRM On Demand and JD Edwards EnterpriseOne Suite. By utilizing best practices AMX delivers an adaptable end-to-end solution giving you faster time to market and faster time to revenue. For more information on how the Oracle Siebel CRM On Demand Integration Pack for JD Edwards EnterpriseOne Integration can simplify your business, contact your AMX Sales Representative or visit www.amxinc.com



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