

Integrating people, processes, and technology!™



CRM and TCA

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FMT Systems Inc.



About FMT Systems Inc.

Faun deHenry

- ❑ President and CEO of FMT Systems Inc.
- ❑ Work during last 20 years involved operating regional consulting organizations
- ❑ Officer in Business Intelligence Special Interest Group
- ❑ Recognized speaker and trainer on topics including *Managing and Sustaining Virtual Teams*, *Best Practices for Virtual Organizations*, *Oracle's e-Business Suite*, and *business intelligence*

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Agenda

- ❑ Introduction
- ❑ CRM Foundation
 - R11*i*
 - R12
- ❑ Trading Community Architecture
 - Data Components
 - R12 improvements and changes
- ❑ Summary
- ❑ Questions and answers

Entity

CUSTOMER

Entity

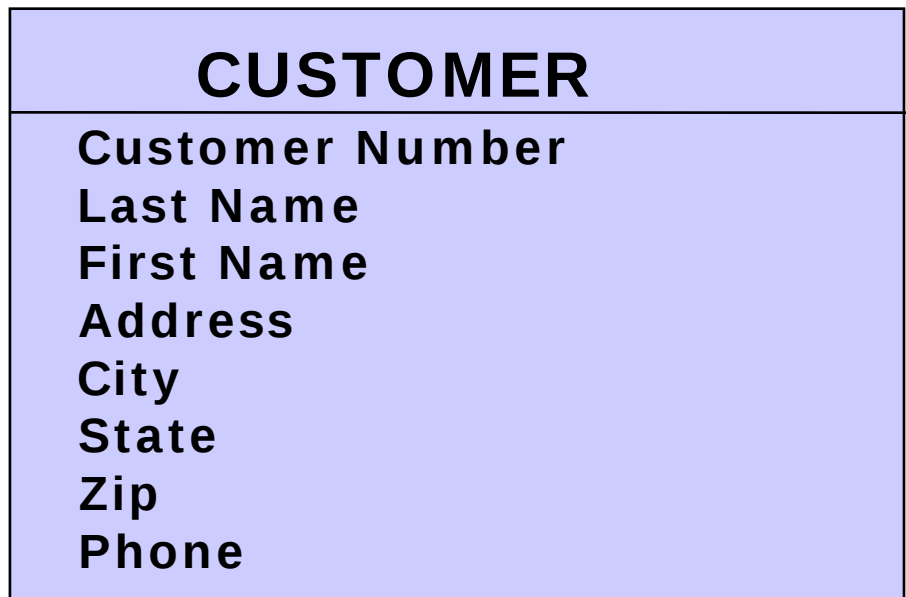
0010
Marla Scott
56 High Street
Yuba City, California
95882-2799
916-293-8749

An Instance of the Entity

An Attribute

- ❑ A discrete data element
- ❑ Describes an entity (i.e., is a characteristic)
- ❑ Meaningful (for the system being modeled)

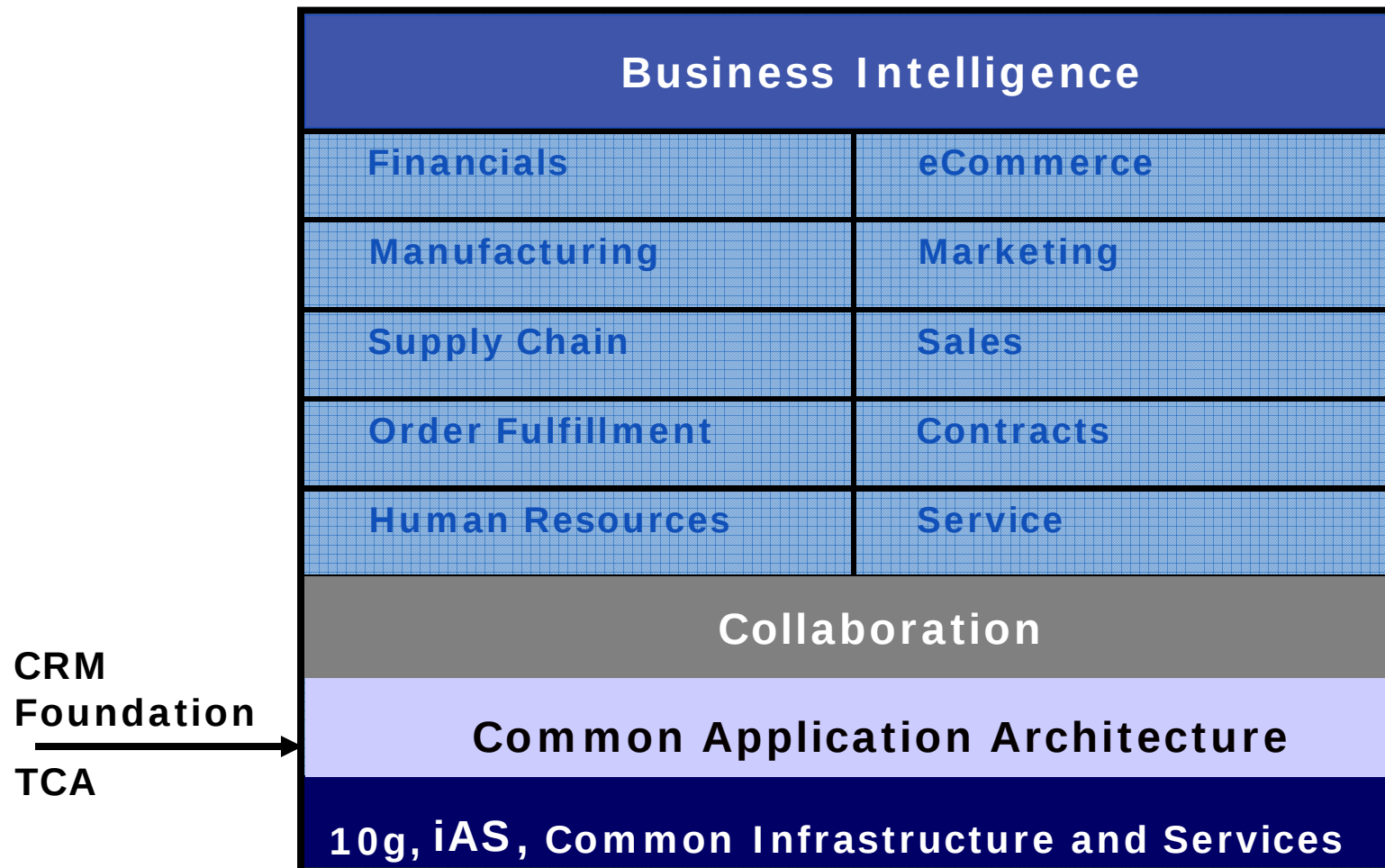
**This Customer entity →
has eight attributes**



Types of Attributes

- ❑ **Simple** - at the atomic, most basic level
- ❑ **Composite** - a related group of attributes
 - example: address (street, city, state, zip)
- ❑ **Single Valued** - only one value per entity instance (e.g., last name, date of birth)
- ❑ **Multivalued** - multiple values per entity instance (e.g., degrees, clubs, skills)
- ❑ **Derived** – calculated, but not stored (e.g., totals)
- ❑ **Identifier** - an attribute that uniquely identifies each entity instance (e.g., Social Security Number)

CRM Foundation and TCA Integration



CRM Foundation and TCA

- ❑ Over 400 JTF_ tables and more than 300 views owned by CRM Foundation
 - ❑ Over 200 HZ_ tables and more than 70 views owned by Receivables product
-
- ❑ Over 500 JTF_ tables and more than 350 views owned by CRM Foundation
 - ❑ Over 220 HZ_ tables and more than 80 views owned by Receivables product

CRM Foundation

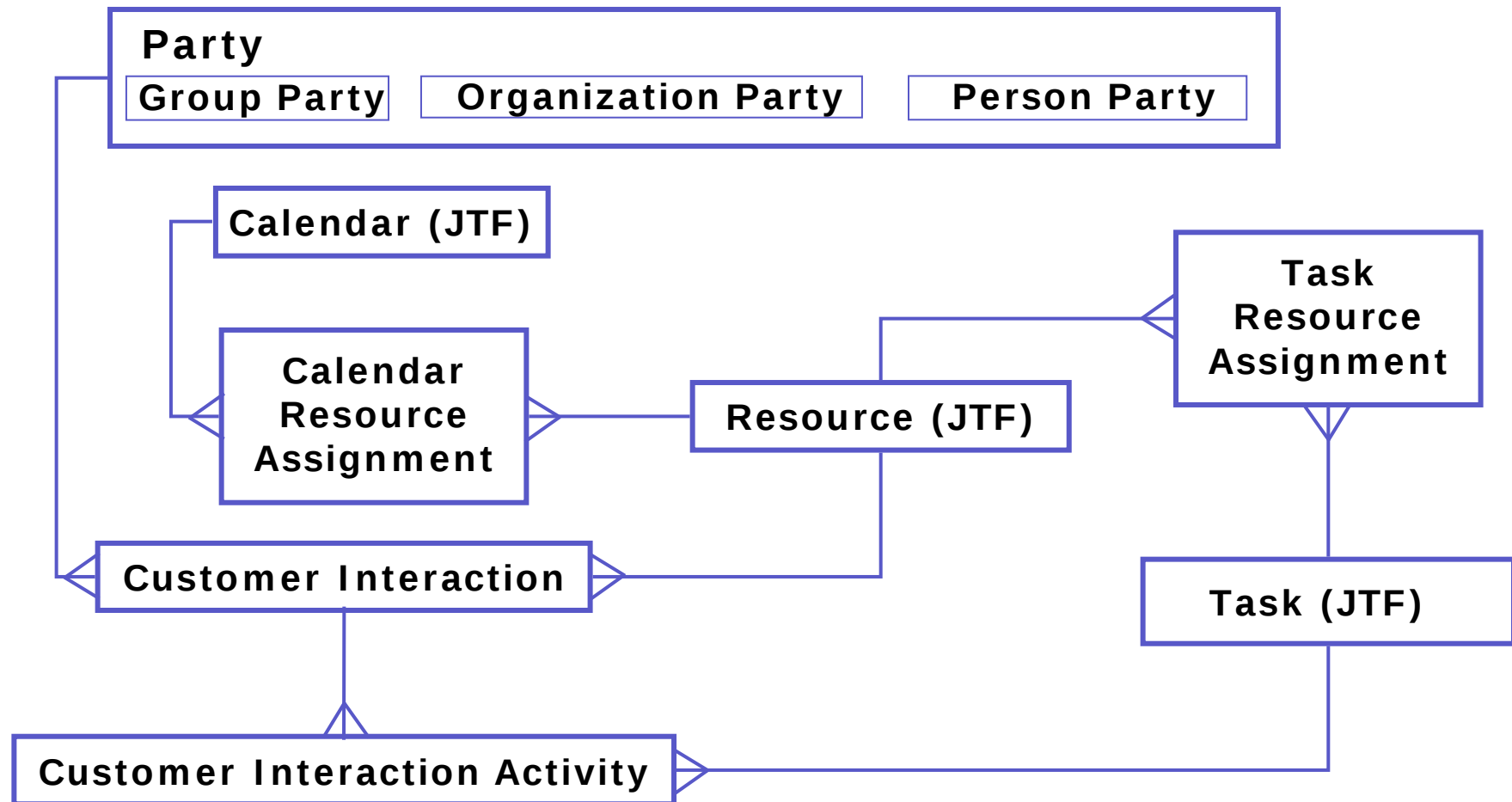
CRM Application and Technical Foundation

- ❑ 1-1 Fulfillment
- ❑ Assignment Manager
- ❑ Business Rules Monitor/Escalations
- ❑ Calendar
- ❑ Common MES Interface
- ❑ Forms GUI Navigation Tools
- ❑ GANNT
- ❑ Geographic Hierarchy
- ❑ Interaction History
- ❑ Notes
- ❑ Product Catalog Categorization
- ❑ Resources
- ❑ Spread table
- ❑ Tasks
- ❑ Territories
- ❑ Services
 - Authentication
 - Profile management
 - Transaction management
 - Template management
 - Persistence
 - Session management
- ❑ Components
 - HTML Stack
 - Message Hooks
 - Product Catalog Visual
 - Common BIS Components
 - Declarative Page Flows
 - Login Issues
 - Wireless Foundation
 - XML Services

CRM Module/Task Integration

Application	Task	CRM Module
Application Object Library (AOL)	1. Creating an FND user 2. Assigning AOL responsibility to the user 3. Setting profile options	• Resource Manager • Notes • Spreadtable • Gantt • Territory Manager • Assignment Manager • Task Manager • HTML-based Calendar • Forms-based Calendar • 1-to-1 Fulfillment • Escalation Manager • Business Rule Monitor
Oracle Human Resources Management System (HRMS)	Creating an employee	Resource Manager
Oracle Human Resources Management System (HRMS)	Creating a new business unit	Resource Manager
Oracle Receivables	1. Creating a customer 2. Creating a new organization	Resource Manager
Oracle Workflow	Creating a workflow with notifications	• Resource Manager • Task Manager • HTML Calendar • Notes • Escalation Manager • Business Rule Monitor
Oracle Inventory	1. Defining categories 2. Defining products and platforms 3. Defining unit of measure classes 4. Defining unit of measure	• Resource Manager • Task Manager • Assignment Manager
Oracle Purchasing	Creating a supplier contact	Resource Manager
Oracle Order Management	Defining sales credit type	Resource Manager
Oracle General Ledger	Setting up accounting flexfields	Resource Manager

CRM Foundation



Getting to eTRM

- ❑ MetaLink Log in.
- ❑ Scroll down the Knowledge Browser page until you see Applications Electronic Technical Reference Manuals (eTRM) on the lower left.
- ❑ Click the eTRM link.
- ❑ Select your Apps version.
- ❑ Click PDF files.
- ❑ Look for AR and/or JTF.

CRM release 12

- ❑ Account Planning (Sales)
- ❑ View Quotes and SO's across business units
- ❑ Integration with Collaboration Suite
- ❑ iSupport and eAM integrated to allow SR's that reference eAM assets

CRM release 12 — 2

- ❑ SR categories
- ❑ Integration with AME
- ❑ AR-AP Netting
- ❑ Tax integration in 11.5 replaced with eTax in 12

CRM R12 RUP2

- ❑ Integration between Order Management and Transportation Management
- ❑ Sales – create user defined variables and source values from DFF's, custom tables, or a Sales Agreement
- ❑ Service
 - Depot Repair – Pricing formula support
 - Service Contracts – Mass Update

CRM R12 RUP3

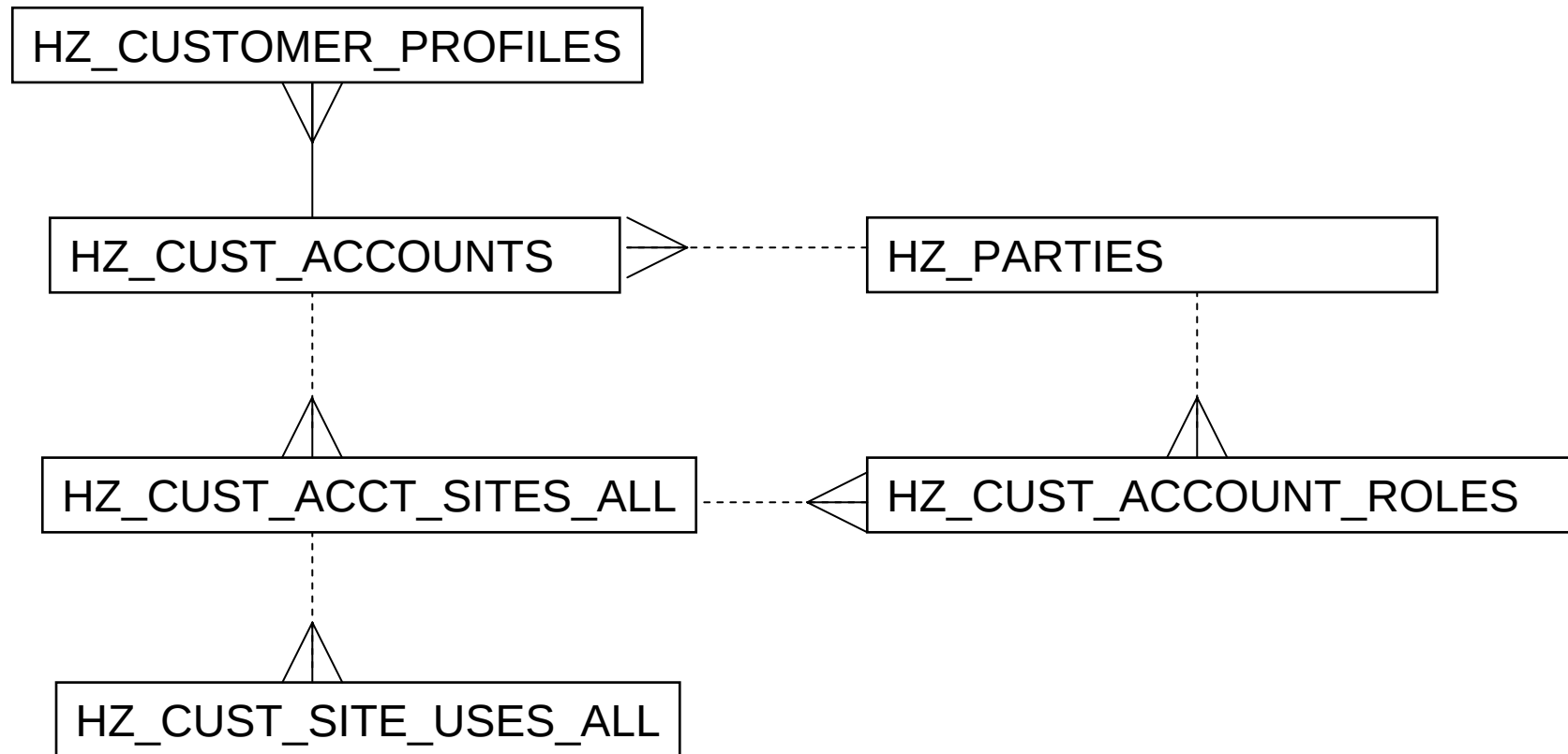
- ❑ Installed Base
 - Part or Serial Number Updates
 - MACD order lines via concurrent program
- ❑ Sales
 - Item update
 - CAC Notes
 - Address location sharing
- ❑ Field Service – Google maps integration
- ❑ Mobile Field Service – scheduled task notification

Trading Community Architecture

TCA Data Model Components

Party:	Represents any entity that can enter into business relationships with your organization — Organization, Person, or Group
Party Relationship:	a binary relationship between two parties such as a partnership. For example, Rebecca Morgan is a specific person party and Acme Inc. is an organization party. Rebecca Morgan at Acme Inc. is also treated as a party with the type <i>relationship</i> .
Location:	A street address
Party Site:	Associates a party with a location, indicating that party's usage of the location
Contact:	A person related to an organization, this can be a relationship between an organization and a person as well as between two people.
Contact Point:	Your avenue of contacting a party, i.e., a phone number, e-mail address, or fax number.
Customer Account:	Represents a customer relationship between your organization and a party.
Customer Account Site:	A party site that you use in relation to a customer account, i.e., a bill-to or ship-to address
Customer Account Contacts:	A party contact that is used as a means of contacting the customer regarding his/her account

HZ Customers



HZ_PARTIES

Columns

Name	Datatype	Length	Mandatory	Comments
PARTY_ID	NUMBER	(15)	Yes	Party identifier
PARTY_NUMBER	VARCHAR2	(30)	Yes	Unique identification number for this party
PARTY_NAME	VARCHAR2	(360)	Yes	Name of this party
PARTY_TYPE	VARCHAR2	(30)	Yes	The party type can only be Person, Organization, Group or Relationship.
VALIDATED_FLAG	VARCHAR2	(1)		Indicates if the party was validated. Y for a validated party, N for a party that is not validated.
LAST_UPDATED_BY	NUMBER	(15)	Yes	Standard who column - user who last updated this row (foreign key to FND_USER.USER_ID).
CREATION_DATE	DATE		Yes	Standard who column - date when this row was created.
LAST_UPDATE_LOGIN	NUMBER	(15)		Standard who column - operating system login of user who last updated this row (foreign key to FND_LOGINS.LOGIN_ID).
REQUEST_ID	NUMBER	(15)		Concurrent Program who column - concurrent request id of the program that last updated this row (foreign key to FND_CONCURRENT_REQUESTS.REQUEST_ID).
PROGRAM_APPLICATION_ID	NUMBER	(15)		Concurrent Program who column - application id of the program that last updated this row (foreign key to FND_APPLICATION.APPLICATION_ID).
CREATED_BY	NUMBER	(15)	Yes	Standard who column - user who created this row (foreign key to FND_USER.USER_ID).
LAST_UPDATE_DATE	DATE		Yes	Standard Who column - date when a user last updated this row.
PROGRAM_ID	NUMBER	(15)		Concurrent Program who column - program id of the program that last updated this row (foreign key to FND_CONCURRENT_PROGRAM.CONCURRENT_PROGRAM_ID).
PROGRAM_UPDATE_DATE	DATE			Concurrent Program who column - date when a program last updated this row).
WH_UPDATE_DATE	DATE			No longer used

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HZ_CUST_ACCOUNTS

Name	Datatype	Length	Mandatory	Comments
CUST_ACCOUNT_ID	NUMBER	(15)	Yes	Customer account identifier
PARTY_ID	NUMBER	(15)	Yes	A foreign key to the HZ_PARTY table.
LAST_UPDATE_DATE	DATE		Yes	Standard Who column - date when a user last updated this row.
ACCOUNT_NUMBER	VARCHAR2	(30)	Yes	Account Number
LAST_UPDATED_BY	NUMBER	(15)	Yes	Standard who column - user who last updated this row (foreign key to FND_USER.USER_ID).
CREATION_DATE	DATE		Yes	Standard who column - date when this row was created.
CREATED_BY	NUMBER	(15)	Yes	Standard who column - user who created this row (foreign key to FND_USER.USER_ID).
LAST_UPDATE_LOGIN	NUMBER	(15)		Standard who column - operating system login of user who last updated this row (foreign key to FND_LOGINS.LOGIN_ID).
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PROGRAM_ID	NUMBER	(15)		Concurrent Program who column - program id of the program that last updated this row (foreign key to FND_CONCURRENT_PROGRAM.CONCURRENT_PROGRAM_ID).
PROGRAM_UPDATE_DATE	DATE			Concurrent Program who column - date when a program last updated this row).

Party

Person



Organization



Group



Party Information

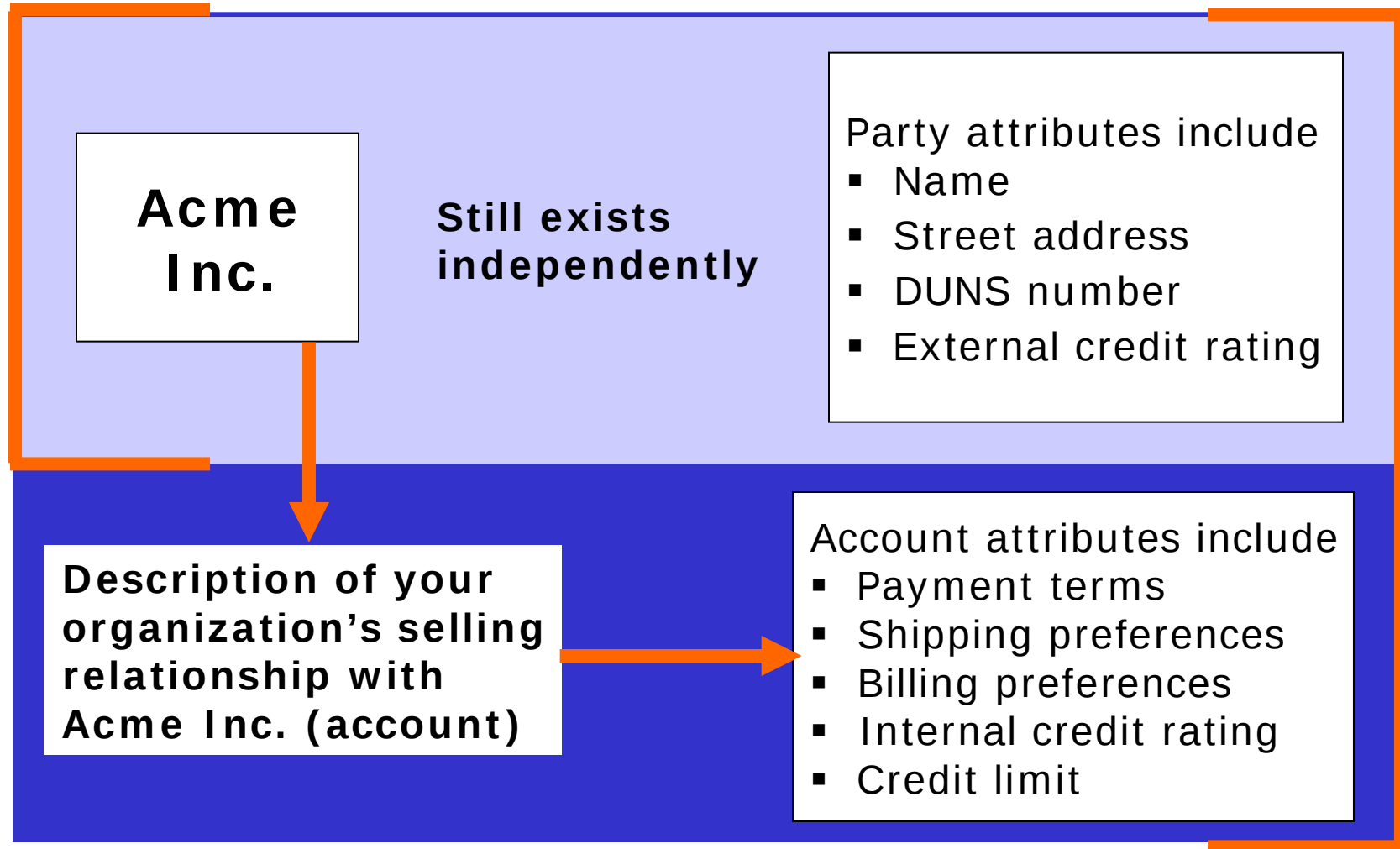
**Acme
Inc.**

**Still exists
independently**

Party attributes include

- Name
- Street address
- DUNS number
- External credit rating

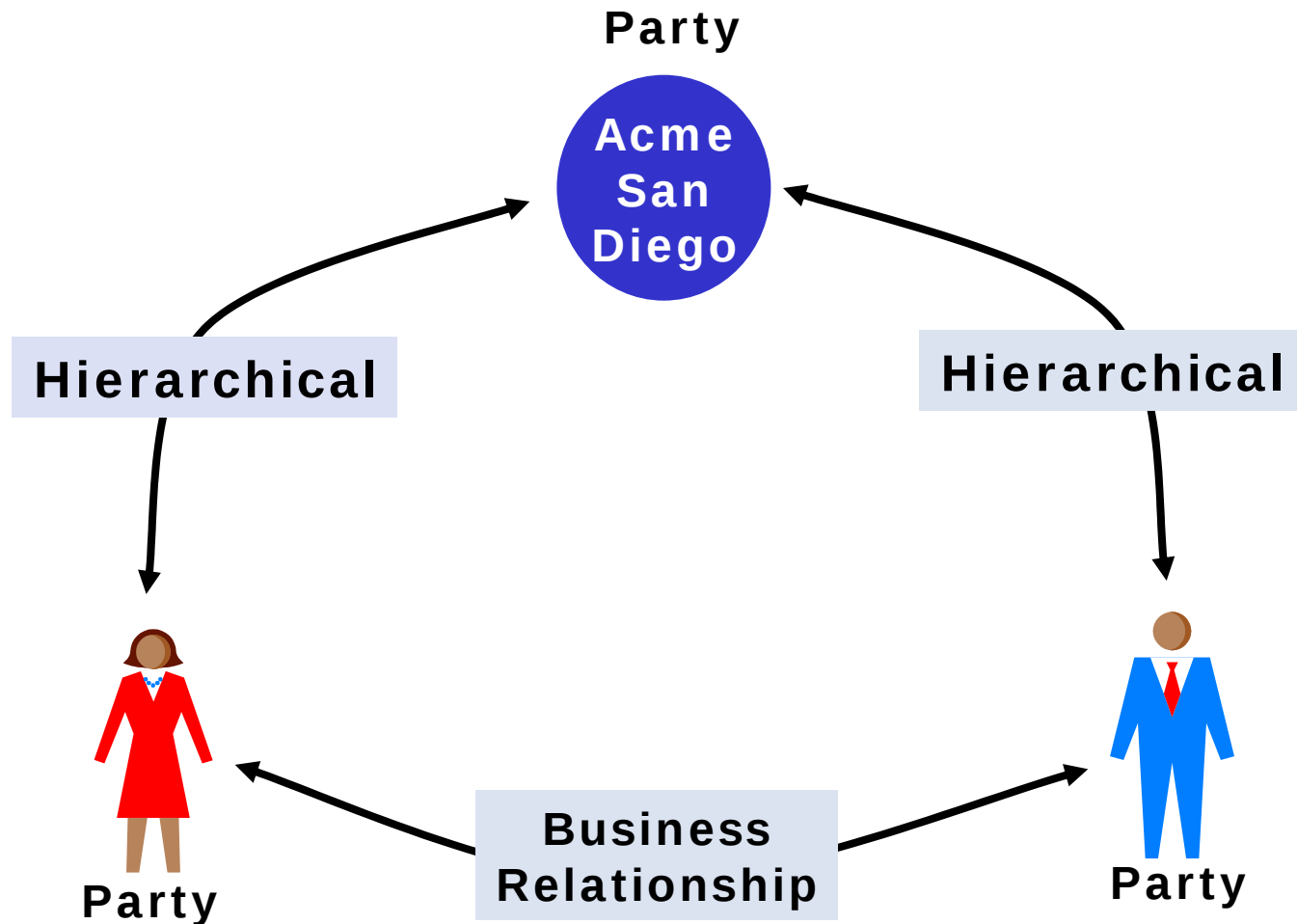
Customer Information and Relationship



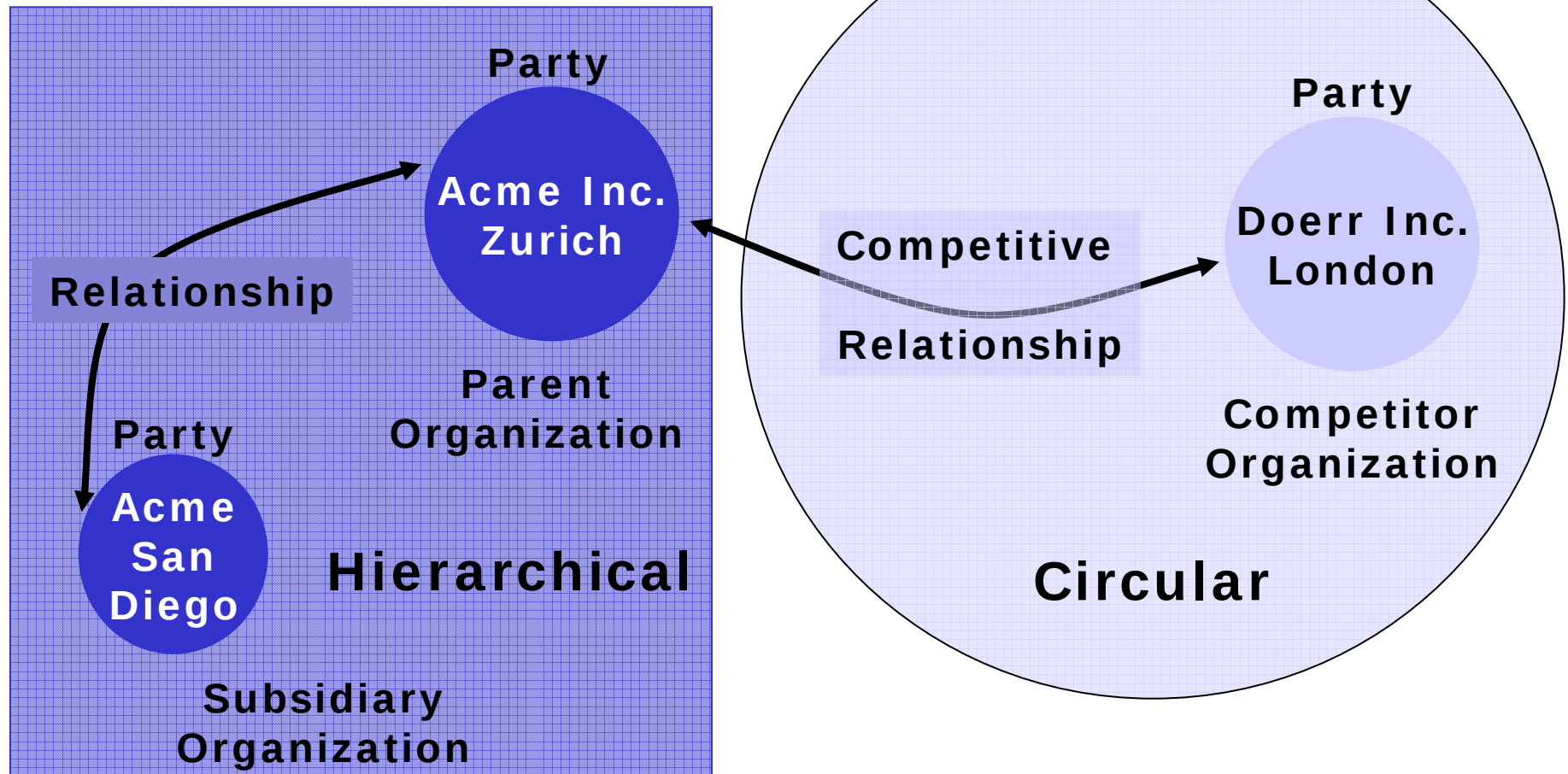
Party Relationship Categories

- ❑ Business relationships
- ❑ Personal relationships
- ❑ Organization to organization relationships
- ❑ Person to organization relationships

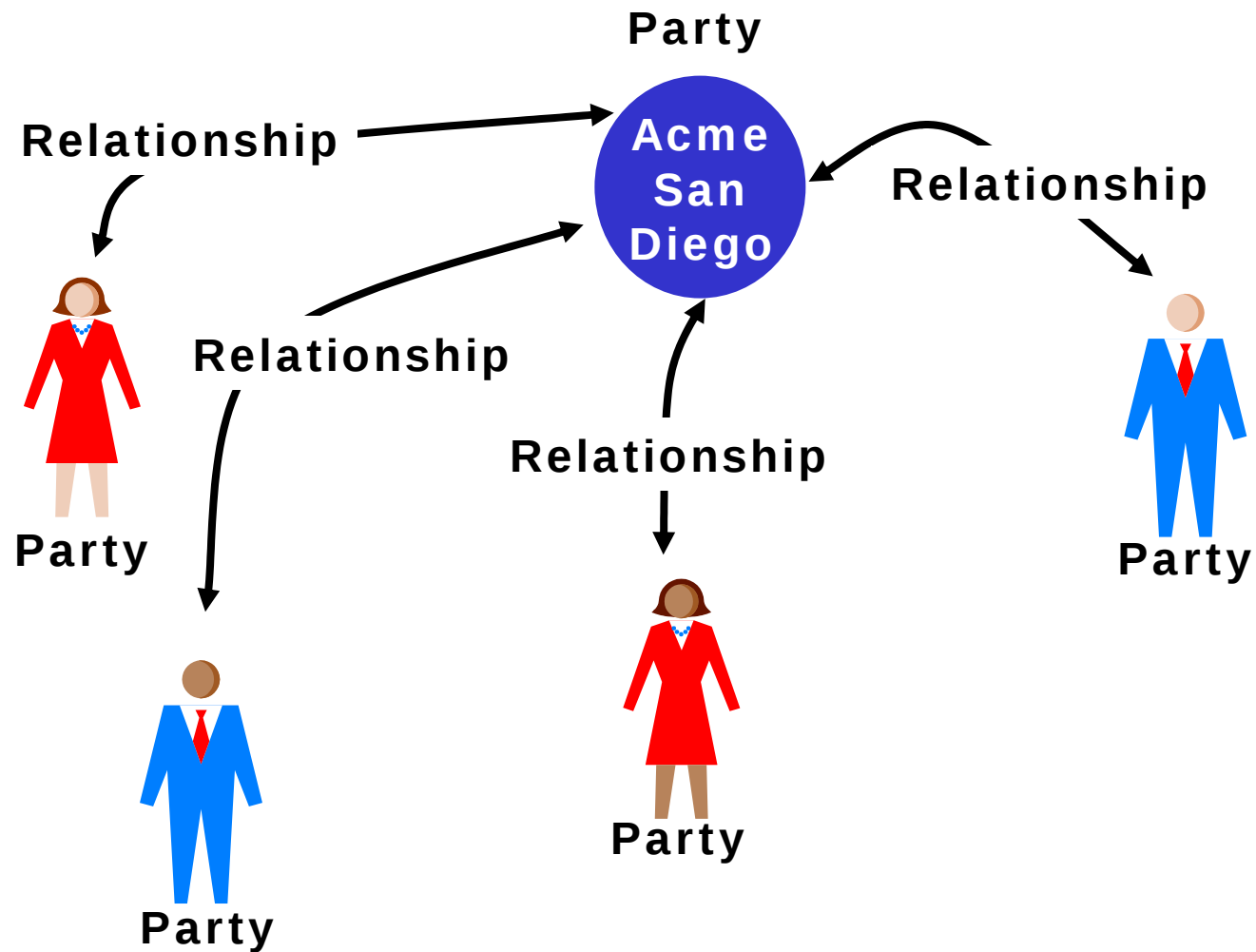
Business Relationships



Organization Relationships



Person to Organization

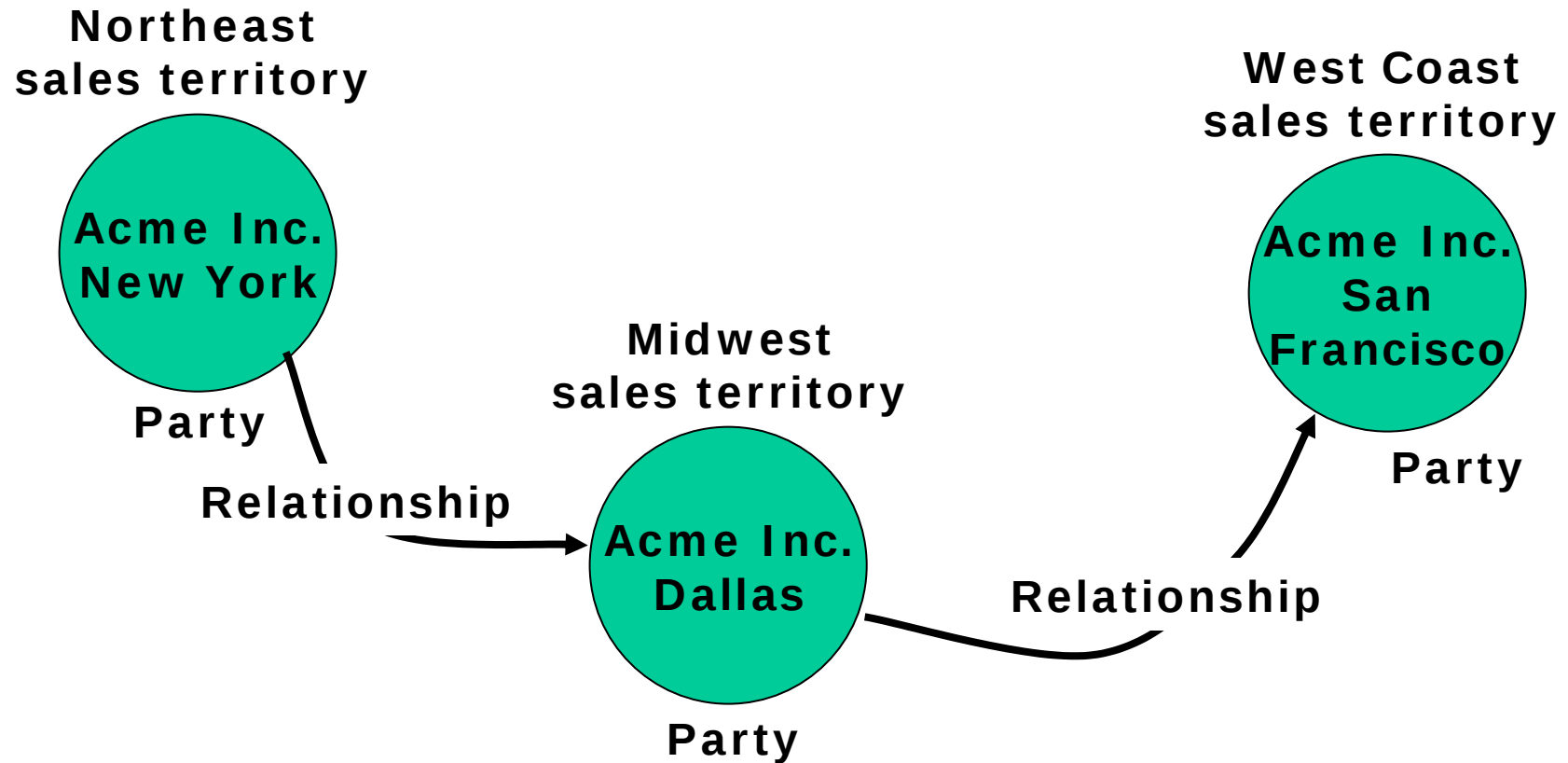


Sample Scenario

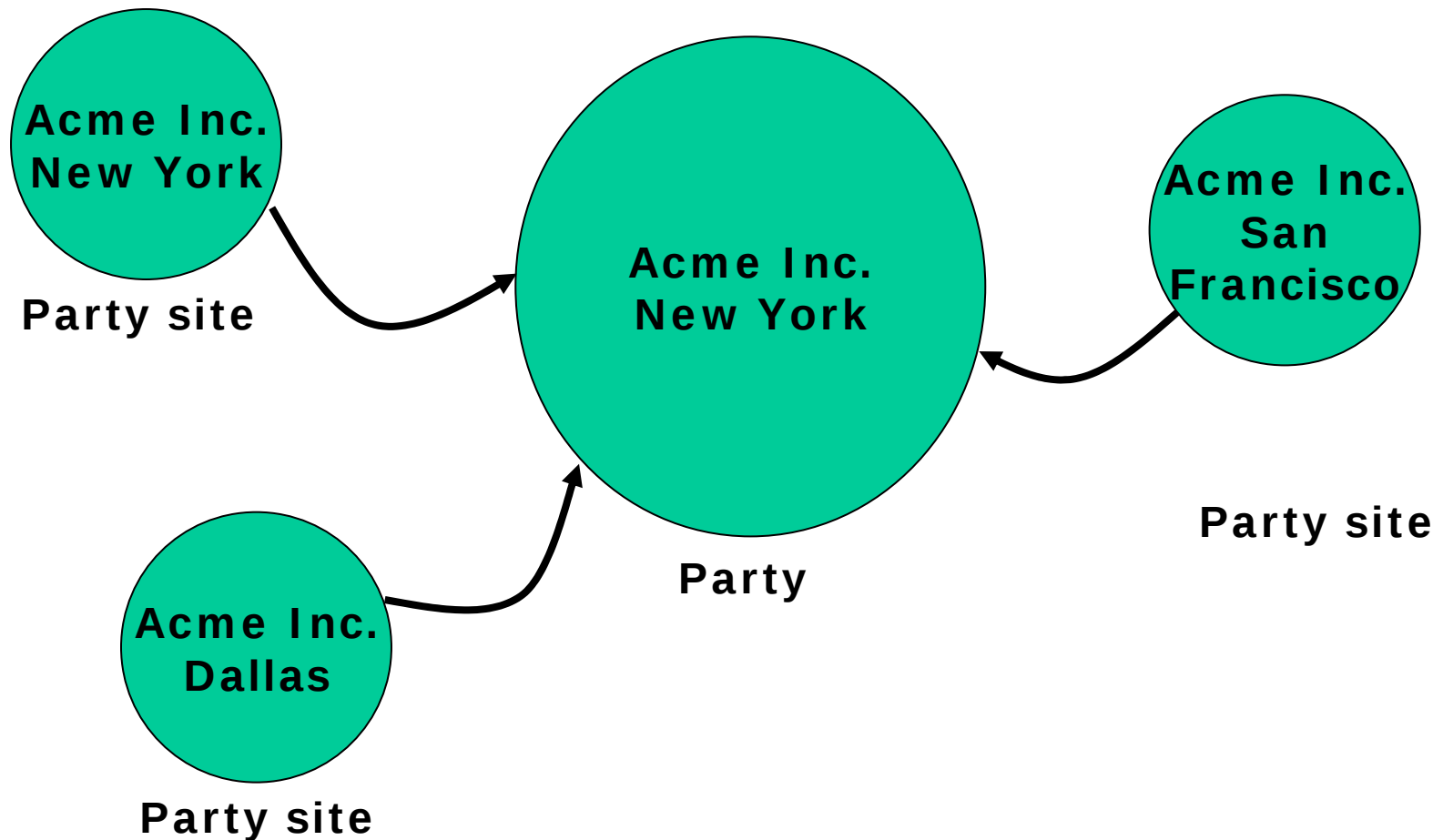
Your sales team returns from a trade show after having identified a prospect Acme Inc. This company has its corporate headquarters in New York with additional offices in Dallas and San Francisco. Your company has sales territories for the Northeast, the Southeast, the Midwest, and the West Coast.

How many parties would you create for this prospect?

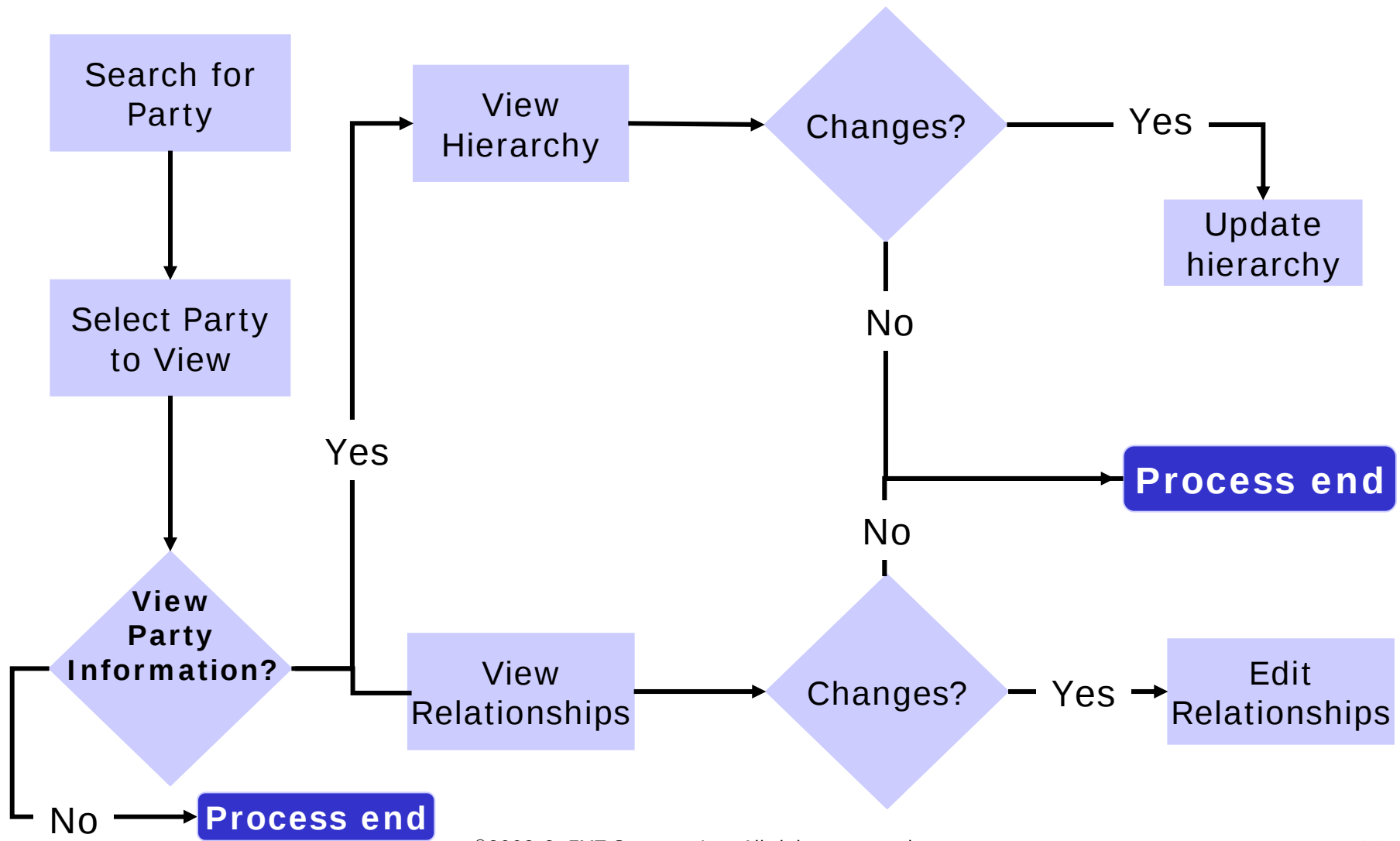
Sample Scenario: Customer Model 1



Sample Scenario: Customer Model 2



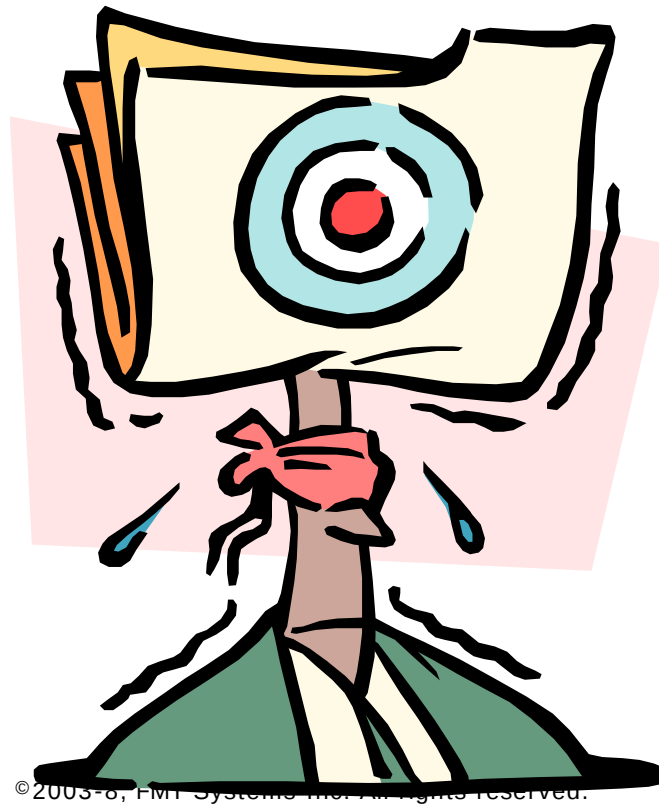
Managing Relationships (process)



TCA release 12

- ❑ Improvements with:
 - Territory management (Territory Manager)
 - Data quality management (Quoting)
 - Audience management (Marketing)
- ❑ AP suppliers included

Questions and Answers



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