



AIA Integration – CRM On Demand to Quoting

NorCal OAUG Presentation January 21, 2009

Nicole Anderson
Jill Vickers

Agenda

- Introductions
- Project Objective and Scope
- Business Drivers and Benefits
- Process Diagrams
- Considerations
- Application Screen Shots
- Challenges
- Lessons Learned
- Questions?

Introduction



- **OAC Services**

- Oracle E-Business Applications & Technology
 - Delivering quality results for over 12 years to 125+ customers
- Certified Oracle Partner
 - Certified Champions: Financials, Order Management, Procurement, HR, DBA's, On Demand, Supply Chain Management, Incentive Compensation, CRM On Demand
 - Certified Oracle Accelerator program participant
- Consulting Staff
 - Business consultants with latest functional application knowledge – from the real world!
 - Technical consultants – software developers, DBA's, technical architects, integration experts
- Regional Area
 - Silicon Valley / Northern California
 - Offices in Campbell, Local Consulting Team
- Industry Expertise
 - Semiconductor, High Technology, Software, Consumer Goods and Retail
- Approach
 - Typically vanilla – leverage Oracle functionality
 - Client Ownership, Knowledge Transfer, Sustainability
 - Project success is key to long-term references & relationships

- **Atheros Communications**

- A leading developer of semiconductor system solutions for wireless and other network communications products
- Combines its wireless and networking systems expertise with high-performance radio frequency (RF), mixed signal and digital semiconductor design skills to provide highly integrated chipsets that are manufactured on low-cost, standard complementary metal-oxide semiconductor (CMOS) processes
- Technology is being used by a broad base of leading customers, including personal computer, networking equipment and consumer device manufacturers

Project Objective

- Implement new processes for
 - Opportunity Capture
 - Quoting
 - Quoting Approval
 - Pricing Management
- Replace Manual Business Process with a System Solution
- Leverage installed applications
 - Siebel CRM On Demand
 - Oracle eBusiness Suite – 11.5.10

Project Scope

- Implement Oracle EBS Quoting Application (HTML)
- Perform additional application configurations
 - Siebel CRM On Demand
 - Order Management
 - Advanced Pricing
- Install and configure AIA integration between CRM On Demand and Quoting
- Use standard out of box functionality where possible
- Conversion of over 200 quotes for historical purposes
- Go-live by Jan. 1, 2009, 5 month project!

Business Drivers

- Reduce quoting process length . . .
 - Via approval workflows, validated and complete data
- Consistent process . . .
 - Across all teams with high data accuracy
- Automated approval hierarchy . . .
 - Delegated to appropriate approvers and auditable
- Real time revenue and margin visibility
- Step to a larger vision . . .
 - Launches Siebel as Sales Portal

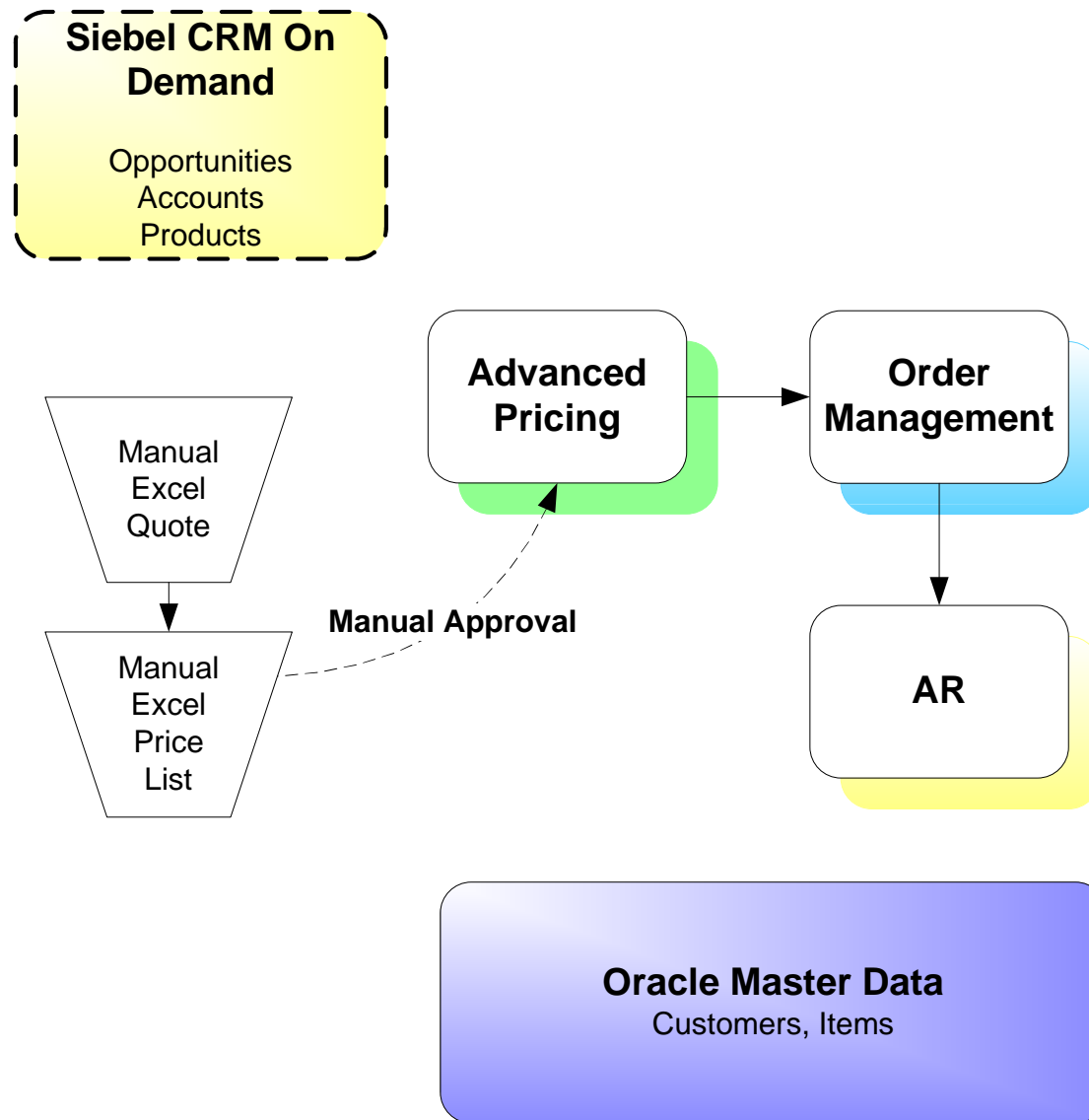
Benefits

- Gain a consistent view of customer information
- Ensure consistent customer data across all applications
- Gain enhanced forecasting visibility across channels
- Increase efficiency and effectiveness by reducing errors
- Reduce the implementation time required to integrate mission-critical CRM applications
- Allocate significantly fewer IT resources

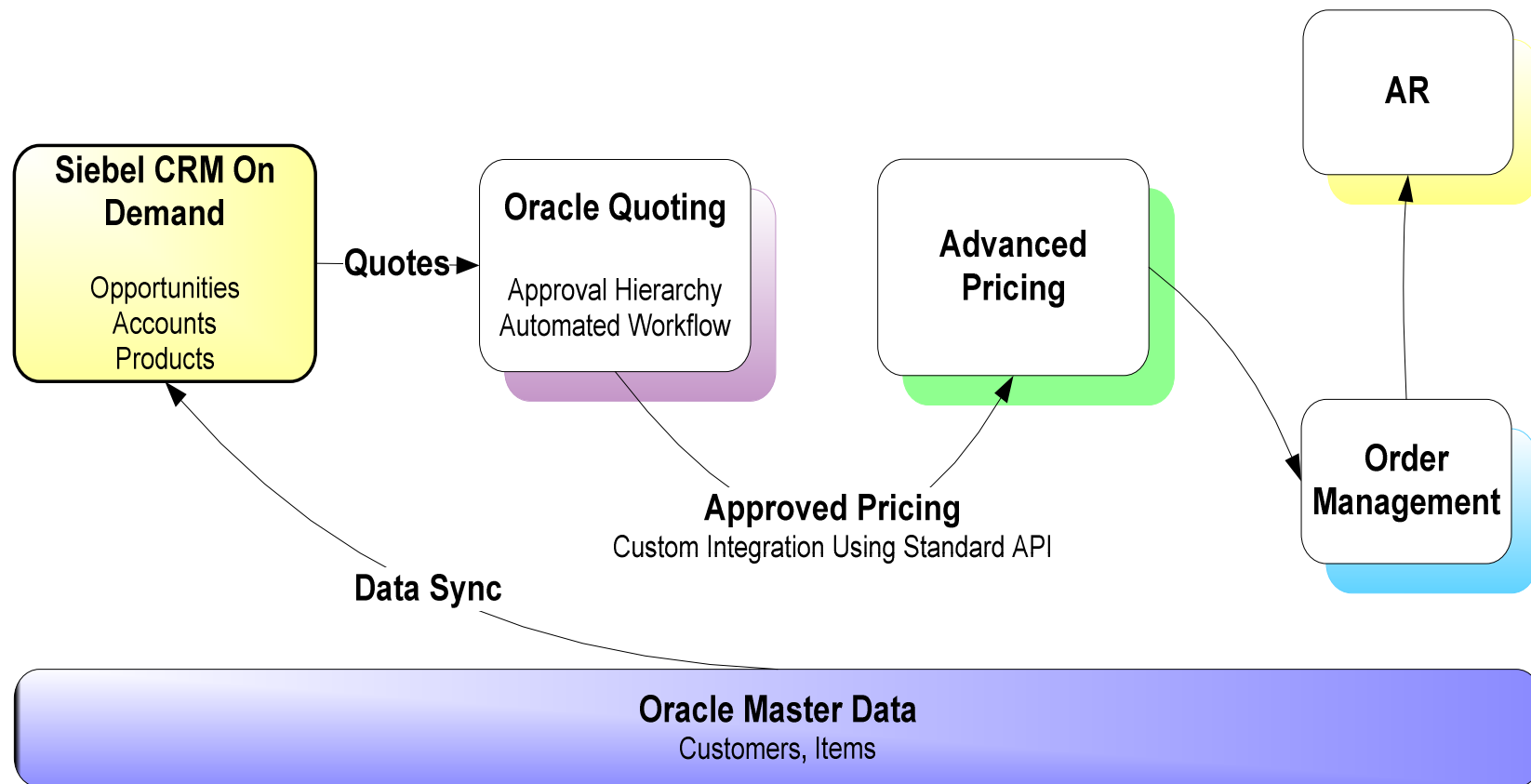
Benefits

- Key features
 - AIA provides a pre-built connector to integrate existing Siebel CRM applications with Oracle applications allowing rapid deployment
 - Consolidate customer, contact and product information across all applications
 - Synchronize customer, contact, opportunity and product data in real-time
 - Supports multiple Oracle CRM On Demand instances
 - Application integration architecture is customizable and extendable based on evolving business requirements

Original State



Current State



Considerations

- Existing master data
- Synchronization of master data
- No single sign-on
- Test environments
- Decision on Basic vs. Advanced Install for SOA
- Configuration of CRM On Demand and EBS Quoting
- Web links

CRM with Quoting Web Links

- Siebel will have the same look and feel, with the addition of:
 - Quotes Tab
 - Web links

[Home](#) | [Calendar](#) | [ODM Account](#) | [OEM Account](#) | [Contacts](#) | [Opportunity](#) | [Reports](#) | [Quotes](#)

Welcome, TEST! [Edit Layout](#) | [Help](#) | [Printer Friendly](#)
 Last Sign In Date - 1/16/2009 12:15:06 PM

Today's Calendar [New](#)

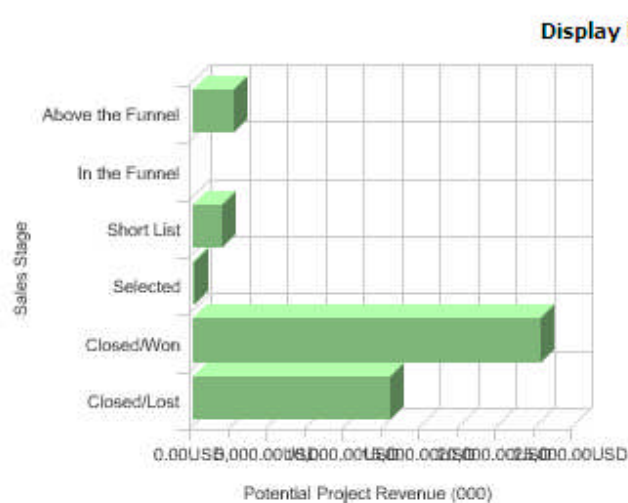
Start Time	Subject
View Calendar	

Open Tasks [New](#)

Due Date	Priority	Subject
Show Full List		

Alerts | **My Recently Modified Opportunity** [New](#)

Pipeline Quality For Current Quarter



Opportunity	Opportunity Metrics			
Sales Stage	Potential Project Revenue (000)	Expected Revenue (000)	# of Opportunities	Avg # of Days in Stage
Above the Funnel	2,650.90 USD	530.18 USD	11	35
In the Funnel	0.00 USD	0.00 USD	2	10
Short List	1,900.00 USD	1,470.00 USD	2	99
Selected	9.65 USD	8.69 USD	2	73
Closed/Won	22,820.00 USD	22,820.00 USD	7	11
Closed/Lost	13,000.00 USD	0.00 USD	1	70

CRM with Quoting Web Links

- Siebel CRM On Demand will have web links to Oracle for quote creation and visibility of customer/opportunity quotes

ORACLE Siebel CRM On Demand Training and Support | Admin | My Setup | Deleted Items | Help | Sign Out

Search Home | ODM Account | Contacts | Opportunity | OEM Account | Reports | Dashboard | Quotes

Opportunity Detail: AIA DEMO Back to OEM Account Detail | Edit Layout | Help | Printer Friendly

Opportunity Details New | Edit | Delete | Coach

Key Opportunity Information:

Project/Program Name	AIA Demo	Potential Project Revenue	\$9,650.00
ODM Account Name	ORACLE CORP.	Probability %	90
Opportunity Type	New Business	Expected Revenue	\$8,685.00
OEM Account Name	SIEBEL CORP.	Sample Date	
Market Channel	High Tech	Design Win Date	
Est. Production Date	1/15/2009	Actual Production Date	2/27/2009
Sales Stage	Selected		

Sales Detail Information:

Status	Competition 1
	Competition 2
	Reason Won/Lost
	Project Winner

Additional Information:

Objective	Modified By	Admin	1/15/2009 03:22 PM
Tactics	Owner	Admin	
Strategy	View Quotes	View Quotes for the Opportunity	
	Create Quote	Create Quote in EBS System	

Comments

Chipset Revenues Add | Update Opportunity Totals

Chipset Name	Quantity	ASP	Revenue	Frequency	# of Periods	Owner
Edit Delete ABC-1234-56	1,000	\$9.65	\$9,650.00			Admin

Show Full List

CRM with Quoting Web Links

- Sales people will be assigned the quoting responsibly to have access to quote creation in Oracle from Siebel
 - Oracle login screen will be embedded into Siebel

The screenshot displays the Siebel CRM On Demand interface. At the top, the Oracle logo and 'Siebel CRM On Demand' are visible, along with navigation links for Training and Support, Admin, My Setup, Deleted Items, Help, and Sign Out. A secondary navigation bar includes Home, Calendar, ODM Account, OEM Account, Contacts, Opportunity, Reports, and Quotes. On the left, a sidebar contains sections for Message Center (0 New Messages), Search (Contacts dropdown, All +, Last Name, First Name, Email, Advanced, Go), and Create (Appointment, Contact, Custom Object 2, Custom Object 3, Lead, ODM Account). The main content area features a 'Welcome to Oracle eBusiness Suite' banner. Below the banner, a 'Session Validation Error' message states: 'Session Validation Error. It could be because either your session timed out or you entered an Invalid Username/Password combination. Please try to Login again. If you have not yet Registered, please Register before trying again. If the problem persists please contact your System Administrator.' A 'Login' form is positioned below the error message, containing fields for 'User ID' and 'Password', and a 'Go' button.

CRM with Quoting Web Links

- The user will receive a confirmation that the quote has been created. The quote name is a hyperlink which allows the user to go directly into the quote to make modifications.

The screenshot displays the Siebel CRM On Demand interface. At the top, the Oracle logo and 'Siebel CRM On Demand' are visible, along with navigation links for Training and Support, Admin, My Setup, Deleted Items, Help, and Sign Out. A search bar is on the left, and a navigation menu includes Home, ODM Account, Contacts, Opportunity, OEM Account, Reports, Dashboard, and Quotes. A confirmation message states 'A new quote has been created.' Below this is a 'Quote List' section with the text 'Quotes for Opportunity: null'. A table lists the created quote with the following data:

Quote Name	Quote Number	Primary Salesperson	Creation Date	Expiration Date	Status	
AIA Demo	2102	Admin, Admin (admin)	01/15/2009	07/14/2009	Draft	\$0.00

Navigation controls for the table include 'Previous', '1 - 1 Of 1', and 'Next' on both sides.

CRM with Quoting Web Links

- After the user logs in, the BPEL integration processes are initialized, the following data is passed
 - Quote name
 - Customer
 - Address
 - Products (price and quantity)

ORACLE QUOTING

Quotes

Overview

Quote Information

- [General](#)
- [Lines](#)
- [Additional Information](#)
- [Submit for Approval](#)

Sales Information

- [Sales Team](#)

Other Information

- [Notes](#)
- [Attachments](#)

Overview

General Information

Quote Name	AIA Demo	Quote Number	2102 Version 1 Of 1
ODM Name	ORACLE CORP.	Account #	1379
Address		Opportunity Source	Siebel On Demand
		Expiration Date	07/14/2009
		Status	Draft
Primary Salesperson	Admin, Admin (admin)	Primary Sales Group	Strategic
		Source Name	
Currency	505 REVENUE US Dollar ✔ Complete	Price List	DEMO ✔ Complete

Lines

✔ For an explanation of the icons and symbols used in the following table, see the [Icon Key](#)

Line	Product	Description	UOM	Quantity	PO Price	Additional Information
1.0	ABC-1234-56	✘ ABC-1234-56	Each	1000	\$0.00	Details

Challenges

- **AIA - Application Integration Challenges**
 - CRM On Demand vs. On Premise
 - Limited documentation
 - Unprecedented
 - Limited test environments available for CRM On Demand
 - Middle Tier Configuration
 - User Configuration

Lesson Learned

- Install proper middle-tier software
- Budget accordingly for configuration of SOA
- Expertise required for mapping and loading data
 - Items
 - Customers
- If a CRM exists prior to implementation, requires additional time to reconfigure

Questions?

Contact



Jill Vickers

jill.vickers@oacsi.com

Nicole Anderson

nicole.anderson@oacsi.com

OAC Services, Inc.

2105 S. Bascom Ave, Suite 159

Campbell, CA 95008

408.340.3428

www.oacsi.com