NorCal OAUG Training Day

19- Jan-2010

Order Upload using Oracle iStore

A New Approach for Channel Partner Ordering

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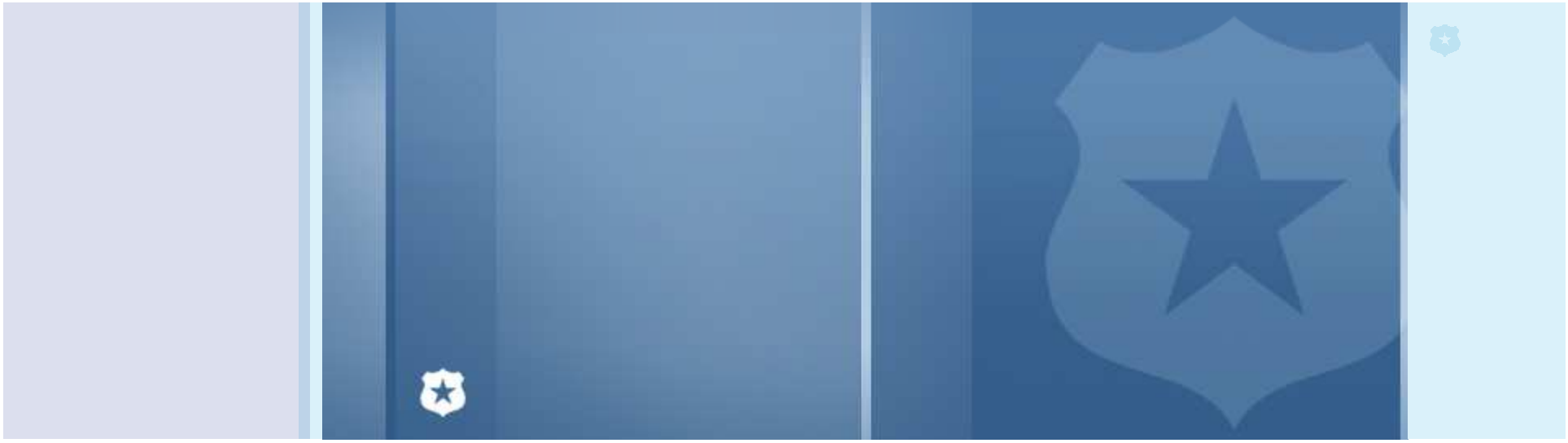

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Agenda

- Presenters Introduction
- Blue Coat's Corporate Overview
- Order Administration Current Practice
- Order Processing Challenges
- IdhaSoft Overview
- OA Requirements
- Solution Considerations
- Order Upload using Oracle iStore
- Solution Phases
- Business Benefits
- Summary
- Contact Info

Blue Coat Corporate Overview

About Blue Coat Systems

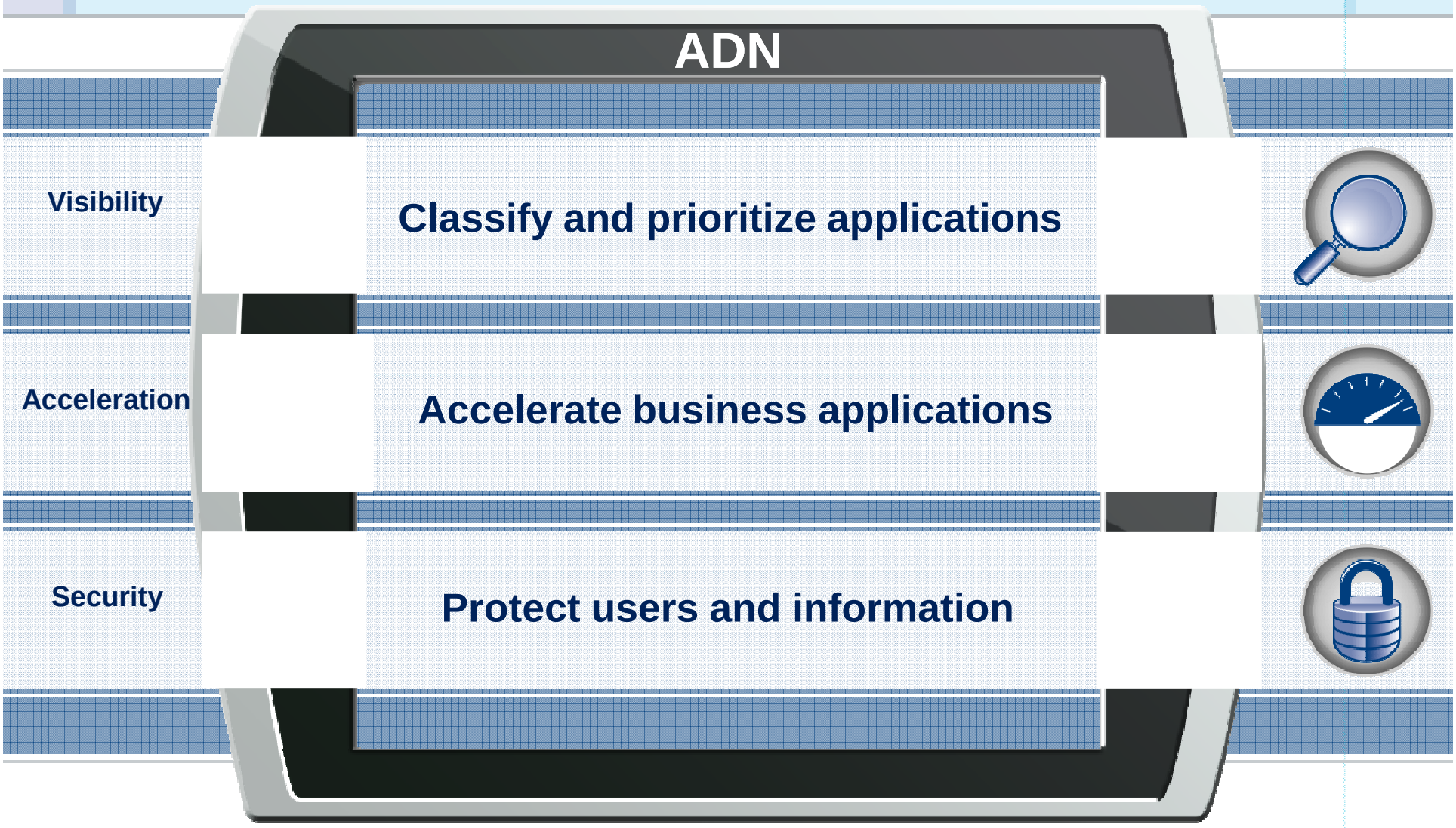
Blue Coat: The Application Delivery Network Technology Leader

Struggling to contain costs and stay competitive in a rapidly changing economy? Let Blue Coat help you enhance productivity, ensure proactive layers of defense, respond quickly to changing business environments and align your network investments to business requirements. Our Application Delivery Network (ADN) infrastructure optimizes and secures the flow of information to any user, on any network, anywhere in the world — helping you fuel a sustainable competitive advantage.

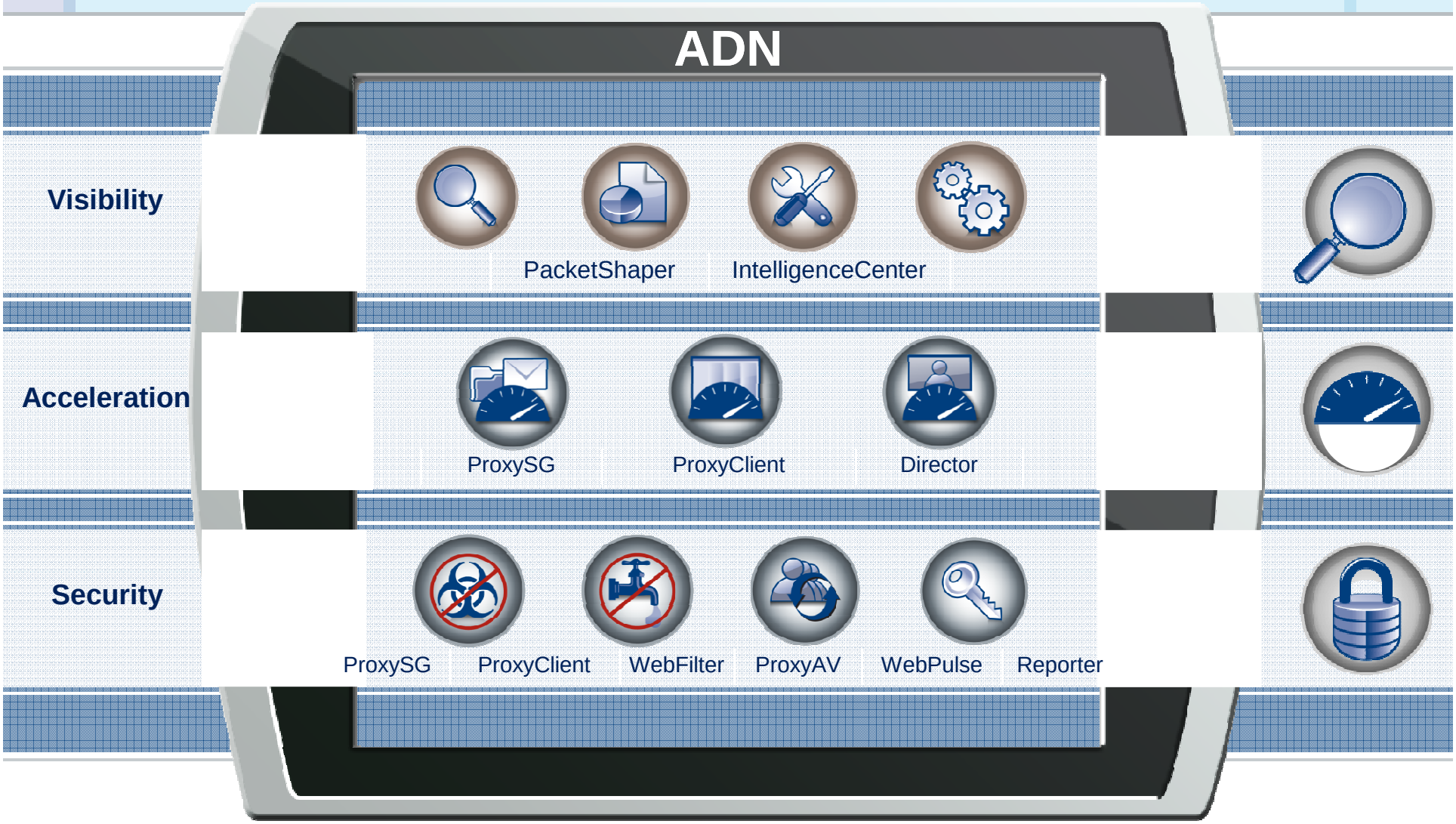
The Application Delivery Network infrastructure addresses the demand for greater application mobility and security in a distributed enterprise. When deployed together, our three core capabilities — Application Performance Monitoring, WAN Optimization and Secure Web Gateway technologies — enable the ADN, providing:

- Visibility to classify and prioritize applications, content and user access in real time
- Acceleration of internal, external and real-time applications across the distributed enterprise
- Security of people and information from malicious applications, content and intent

Optimize and Secure



Infrastructure



Fact Sheet

STOCK SYMBOL

NASDAQ: BCSI

NASDAQ Global Select Market tier the highest level for companies listed on NASDAQ based upon measures including market value, liquidity and earnings

EMPLOYEES

More than 1,450 employees worldwide

REVENUE

FY09: $445M (May-April)
Q110: $116M
Q210: $120M

CUSTOMERS

- 15,000 customers in more than 150 countries
- 83% of the Global FORTUNE® 500 (i.e., 4 out of 5 of the Global FORTUNE 500)
- 97 of the 100 largest companies in the world

LEADERSHIP

Brian NeSmith,
President and Chief Executive Officer, Board Member

Blue Coat Corporate Fact Sheet

Industry Recognition

-> **Positioned in Leader's Quadrant** of Gartner's Magic Quadrant for WAN Optimization Controllers 2009

-> **Positioned in Leader's Quadrant** of Gartner's Magic Quadrant for Secure Web Gateway 2008

-> **Ranked as the market leader** in WAN Optimization; Infonetics Research Q2 - 2009

-> **Ranked as the market leader** of Content Security Gateway Appliances, Infonetics Research Q2 - 2009

Product Innovation

-> **ProxySG appliances** – Application acceleration, control and visibility at internet gateways and remote or branch offices

-> **PacketShaper appliances** – Understanding and monitoring application performance, providing the ability to maintain application SLAs, fine-grained bandwidth management

-> **ProxyClient software** – WAN optimization and Web security for mobile and remote workers

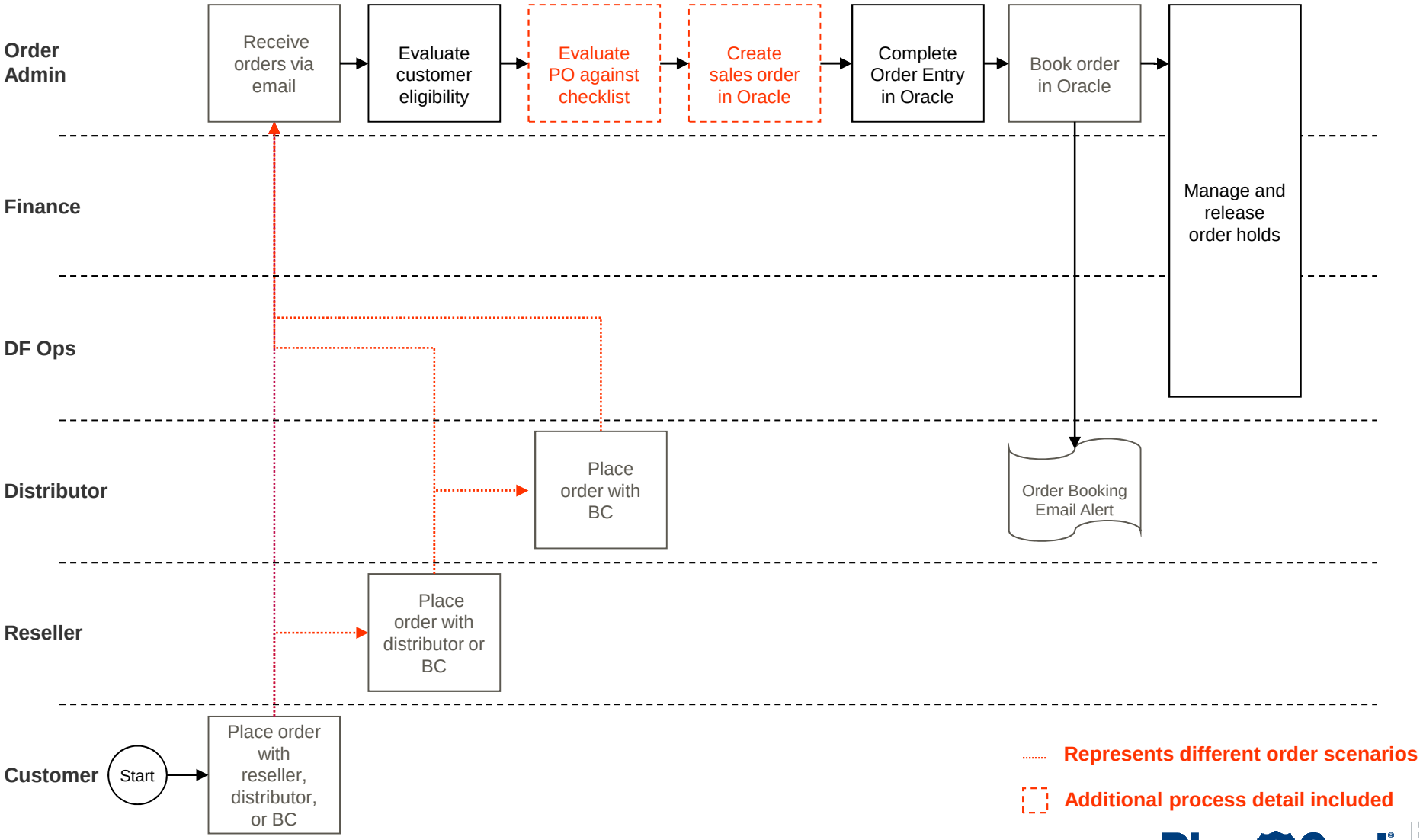
-> **WebFilter software** – Web categorization and identification of malware sources

-> **WebPulse™ service** - the real-time cloud computing security service that extends its Blue Coat WebFilter product

-> **ProxyAV appliances** – Detect malware and malicious code at the Web gateway without slowing traffic

-> **185+ patents** issued and pending

Order Management Process



Order Processing Challenges

- 100% Manual Order Entry
  - All PO's are received by Fax/Email
  - No Electronic Ordering
- Poor Incoming Order Quality
  - Missing Information
  - Incorrect Data
- Receipt to Book Lead Time is High
  - Delay in Order Entry/Booking due to data quality
  - Many Internal processes requires manual auditing
  - Requires back and forth communication with customers
- Lack of visibility to Order Status for Sales Teams
  - No instant order status visibility causes High volume of order inquiries

Order Administration Audit Metrics

- Q3-08 had an 82.5% order entry accuracy for 702 orders audited

	Team Totals
Audited	**702**
Total # of Errors	**123**
Rev Rule	**10**
Discount %	**13**
Attachments	**42**
Other	**59**
Rate of Error	**17.52%**

Examples

- Discrepancy on NSP form
- Discount approval form/email
- **Freight method does not match PO**
- **Serial number tracking report**
- **PSP service isn't linked**
- **Order Discount Detail Report**

Idhasoft Corporate Overview

idhasoft
Vision Packaged. Delivered

"A global world-class organization that provides best-of-breed localized business and technology solutions, with continuous innovation and quality backed by best-in-class people"

$275M Revenue - 2010
1,000 Global Consultants

- Services Portfolio
- Strategic Consulting
- Enterprise Applications
- Technology Consulting
- Software Licensing
- Managed Services
- BI Consulting

Our Core Businesses and Technologies

idhasoft
Vision Packaged. Delivered

Verticals	Manufacturing	Technology & Media	Telecom	Gov.	Healthcare	Retail	Financial Services
Services	Management Consulting						
	Business Process Reengineering						
	ERP Implementations / Enhancements / Maintenance / Upgrades						
	Quality Assurance / Application Testing services						
	Application Integration Services						
	Application Development						
	Onsite / Offsite / Remote Application Management						
Products	**ERP / CRM / BI** Oracle SAP Siebel Hyperion						
					Idhasoft Healthcare Products	Idhasoft Retail Products	Idhasoft Financial Products

Oracle Service Offerings

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Vision Packaged. Delivered

Service Offering	Expertise	Key Customers
Oracle Licensing	▪ License Optimization and Compliance ▪ Contract and Pricing Negotiation	▪ Capital Source ▪ Coherent
ERP Services	▪ Full EBS implementations, Upgrades, Enhancements ▪ Edge product support (Agile, Demantra, PeopleSoft, etc) ▪ Multi-Org Implementations	▪ Bridgelux ▪ Cortina ▪ AKT /Applied Materials ▪ TIBCO
SOA & Middleware	▪ Oracle Fusion, Oracle Application Server, BEA Weblogic Suite, ClearApp	▪ Formfactor ▪ 3ParData
BI and DW Consulting	▪ Oracle BI Analytics and Hyperion ▪ Implementations, Capacity Planning and Performance Tuning	▪ Exar ▪ Cortina
Infrastructure & 24/7 DBA Services	▪ Onsite/Remote DBA ▪ Installation and maintenance, Performance Tuning, Backup and recovery ▪ High Availability	▪ Barnes & Noble ▪ Silicon Valley Bank ▪ DSW
Application and Database Management	▪ Guaranteed system availability ▪ Functional, technical and DBA support ▪ Onsite and Offshore models	▪ eSilicon ▪ Orange Lake ▪ Nokia

Recap of project requirements

- Order automation to support explosive growth
  - # of orders doubled from 2007 to 2008
- Improve incoming order quality from partners
  - Improve OA rep productivity
  - Reduce cycle time
- Replace Packeteer online portal for ordering as part of acquisition

Solutions considered – 1. Standard Oracle iStore

- Standard iStore implementation
  - Implement standard Oracle iStore shopping cart solution
    - Partner browses through a store front to select parts to be ordered
    - Goes through an Amazon.com style check out process for ordering
  - Pros
    - Standard Oracle Solution
  - Cons
    - Partner needs to re-key-in orders already entered in their ERP system
    - Major customizations required
      - Handling non-standard pricing
      - Entry of reseller and end-user information
      - Order resubmission workflow
      - Service renewals
    - Implementation cost was prohibitive due to customizations

Solutions considered – 2. EDI Ordering

- EDI solution
  - Partner sends purchase orders via EDI
  - EDI file is generated from Partner's ERP system
  - Pros
    - Eliminates need for partner to re-key-in order
    - Order comes in entered status to Blue Coat saving OA data entry time
  - Cons
    - Does not resolve order quality issues
    - Does not provide real time feedback on order errors to partners
    - Does not significantly improve OA productivity
    - Additional solution required for online order, invoice and payment status
    - More suitable for high volume standard orders where as BlueCoat has low volume non-standard orders

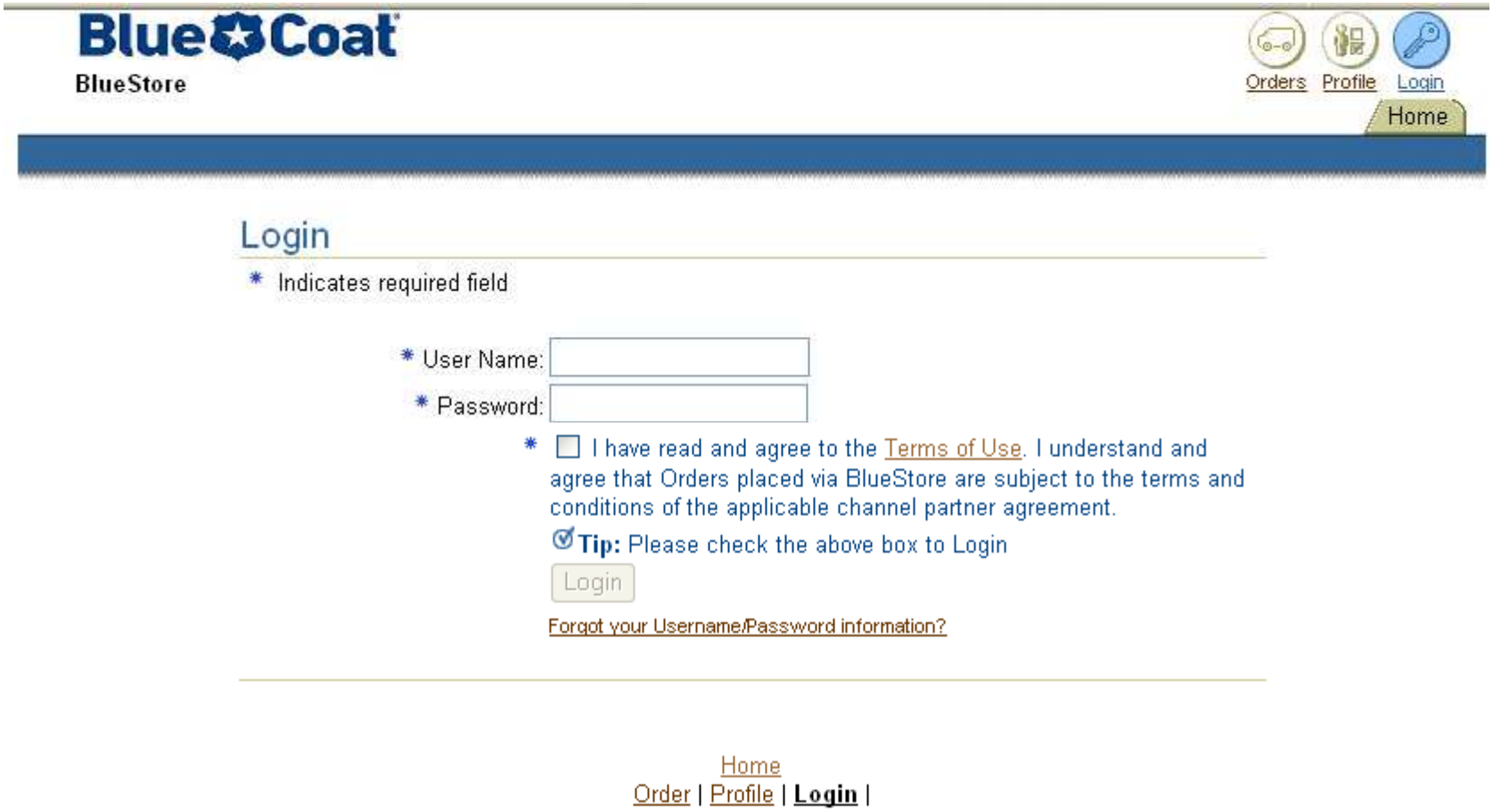
Solutions considered – 3. Order upload from iStore

- Order upload via Oracle iStore
  - Partner generates PO file from their ERP system
  - Partner uploads file from iStore
  - Customer validation engine provides real time quality check at source
  - Orders is submitted online
  - Order is imported into Oracle Order Management
  - Partner can view status online
    - Order status
    - Invoice status
    - Payment status

Solution Selected – 3. Order upload from iStore

- Order upload via Oracle iStore
  - Pros
    - Eliminates need for partner to re-key-in order
    - Order comes in entered status to Blue Coat saving OA data entry time
    - Greatly improves order quality
    - Greatly improves OA efficiency
    - Security platform and order status is standard from Oracle iStore
  - Cons
    - Largely custom solution built on Oracle iStore (but costs significantly lower than customizing iStore shopping cart)

BlueStore User Login



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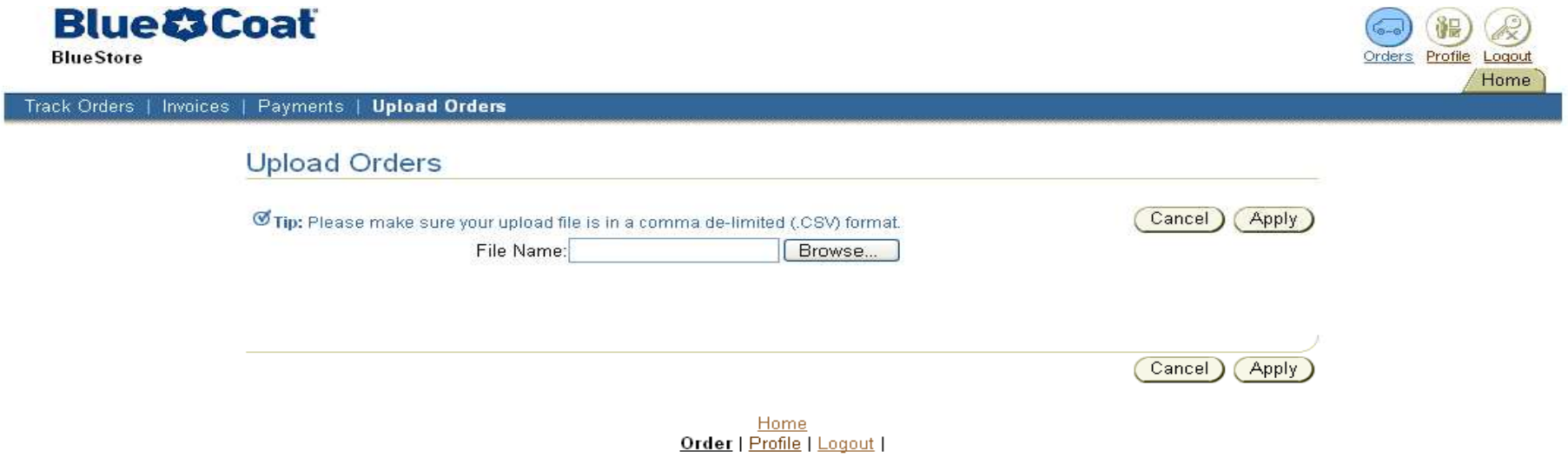
Upload Order File



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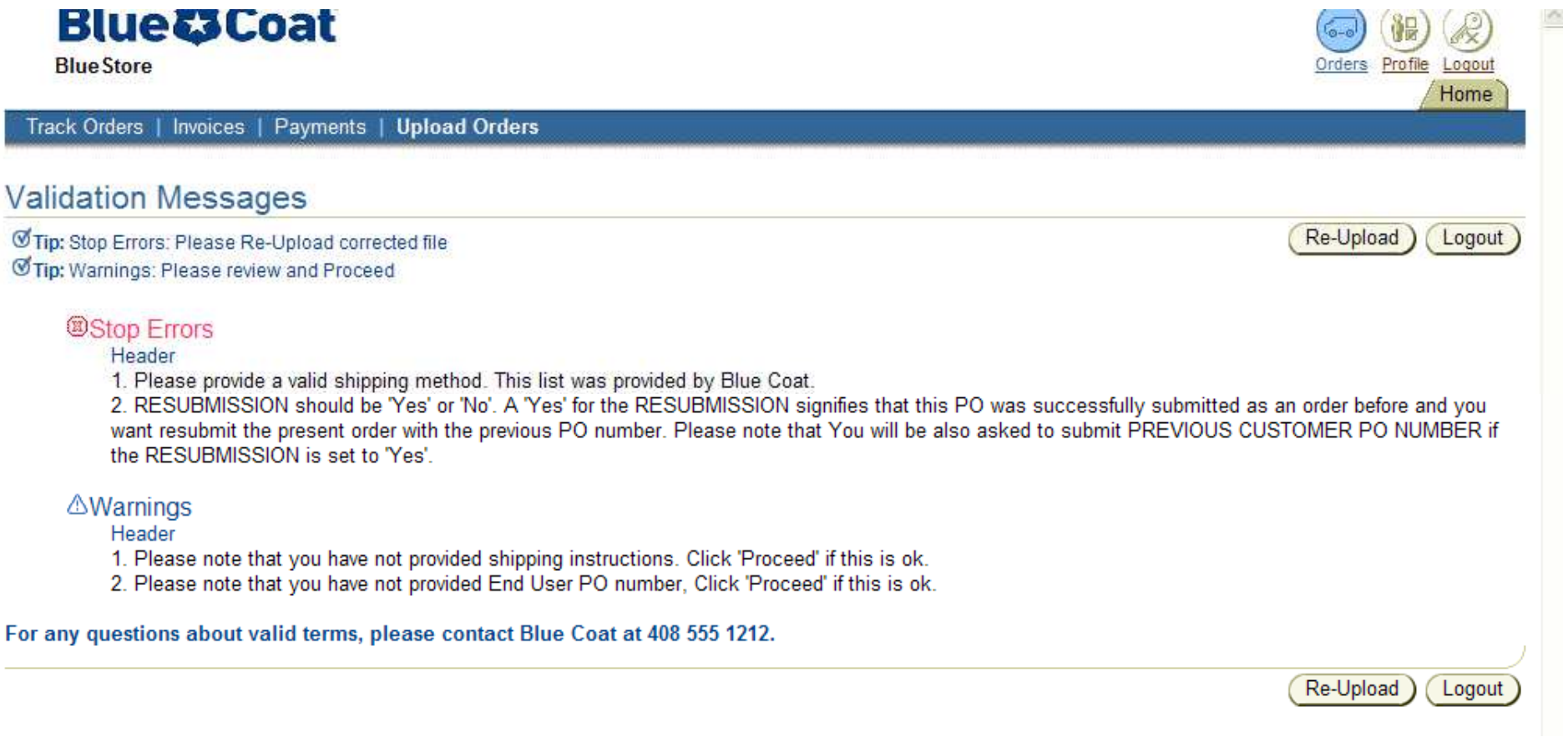
Validation Messages



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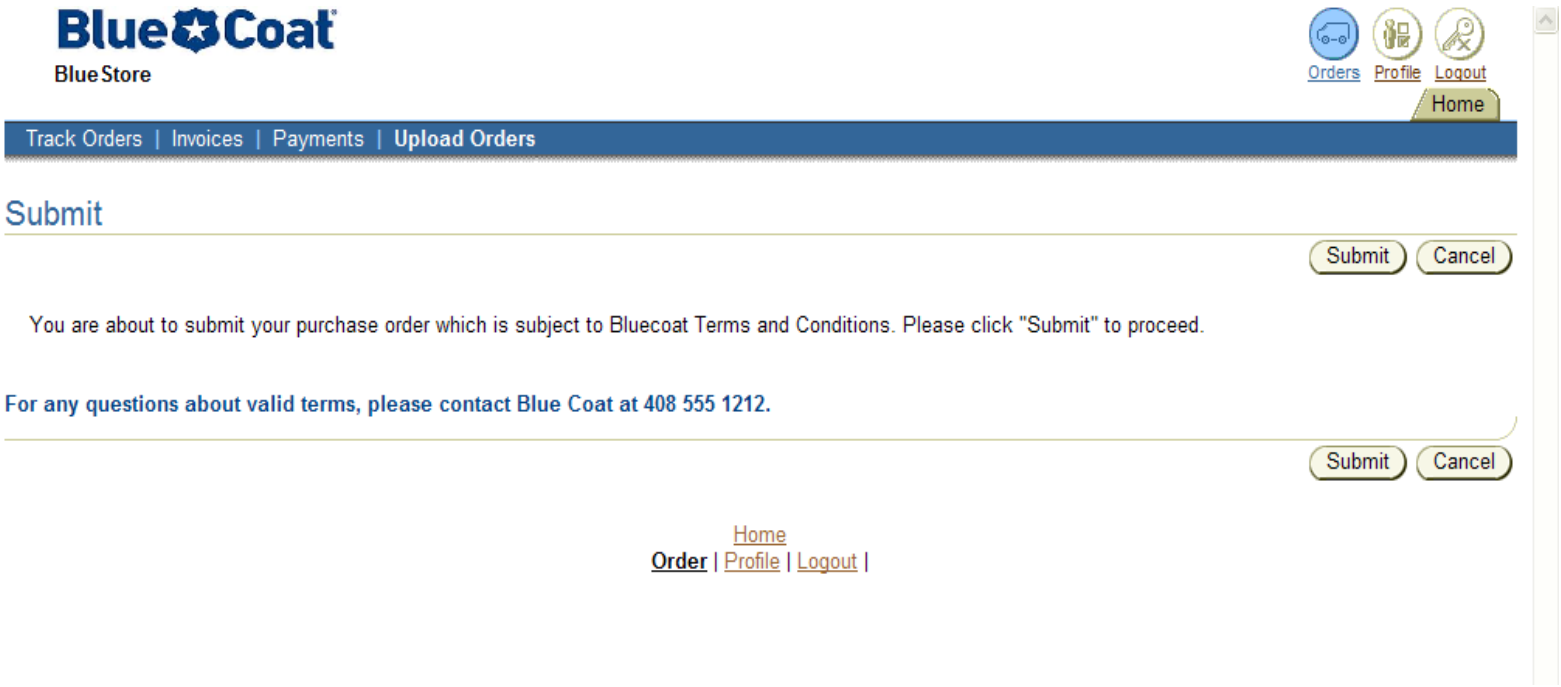
Confirmation Message



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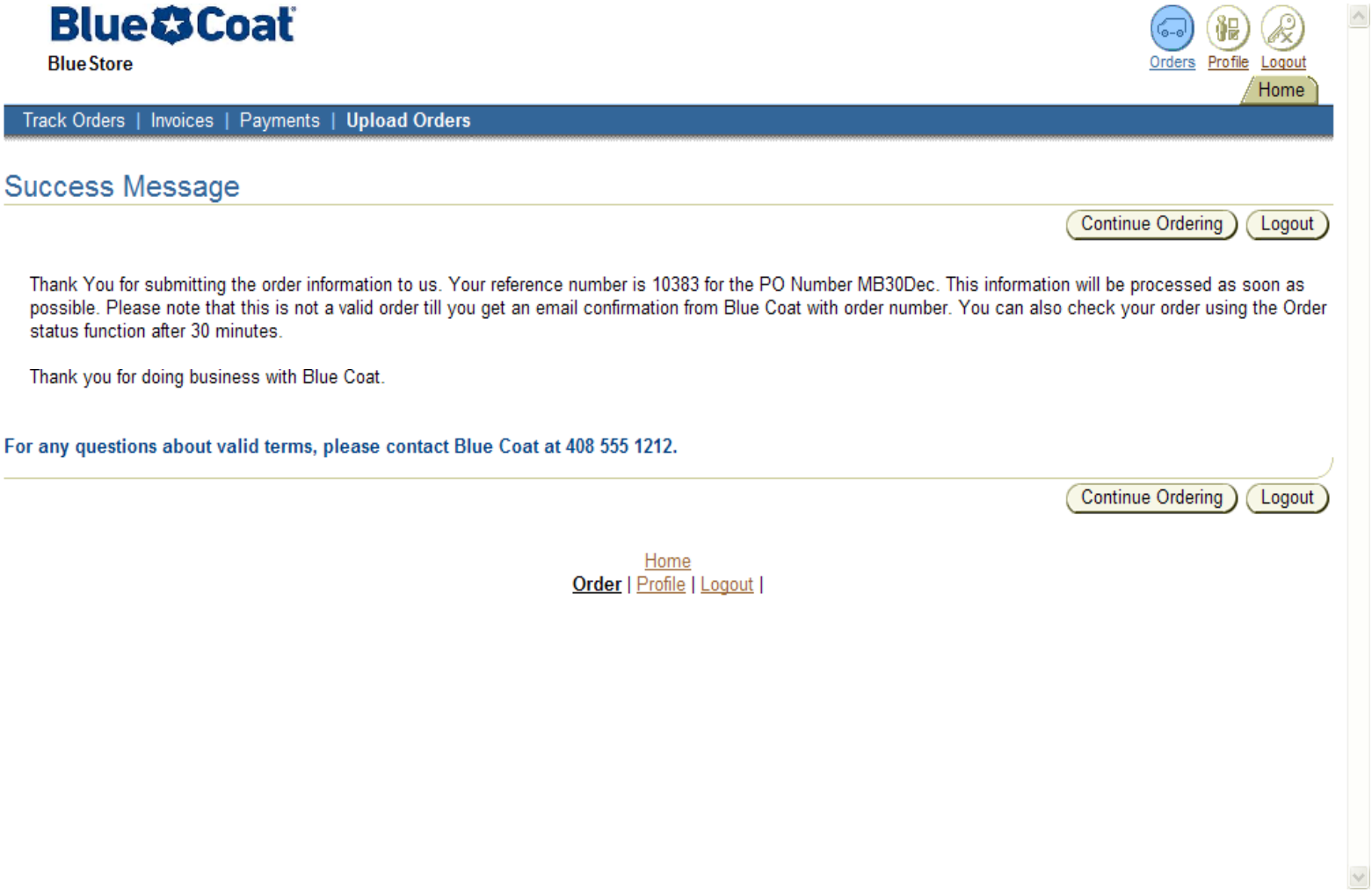
Success Message



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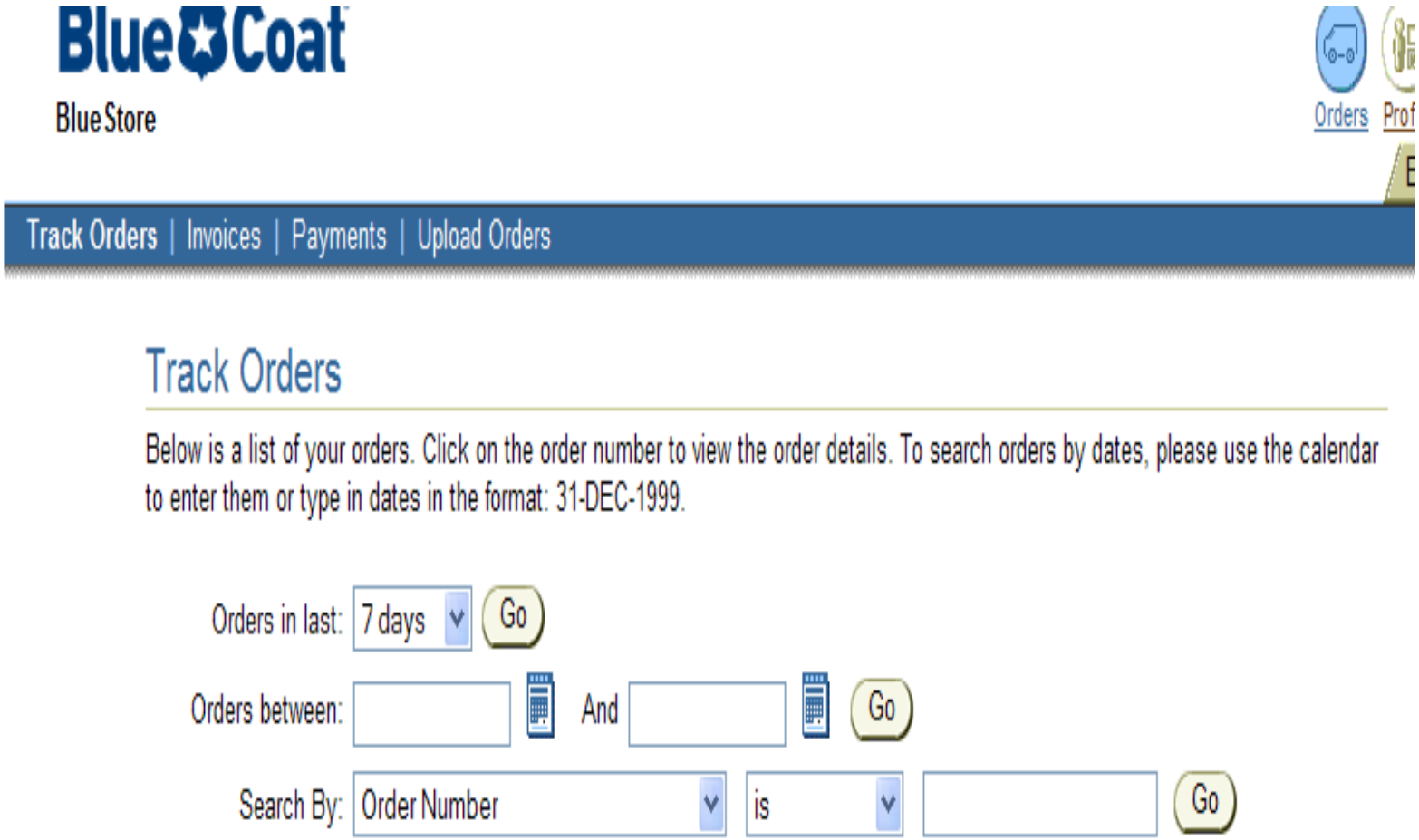
Track orders



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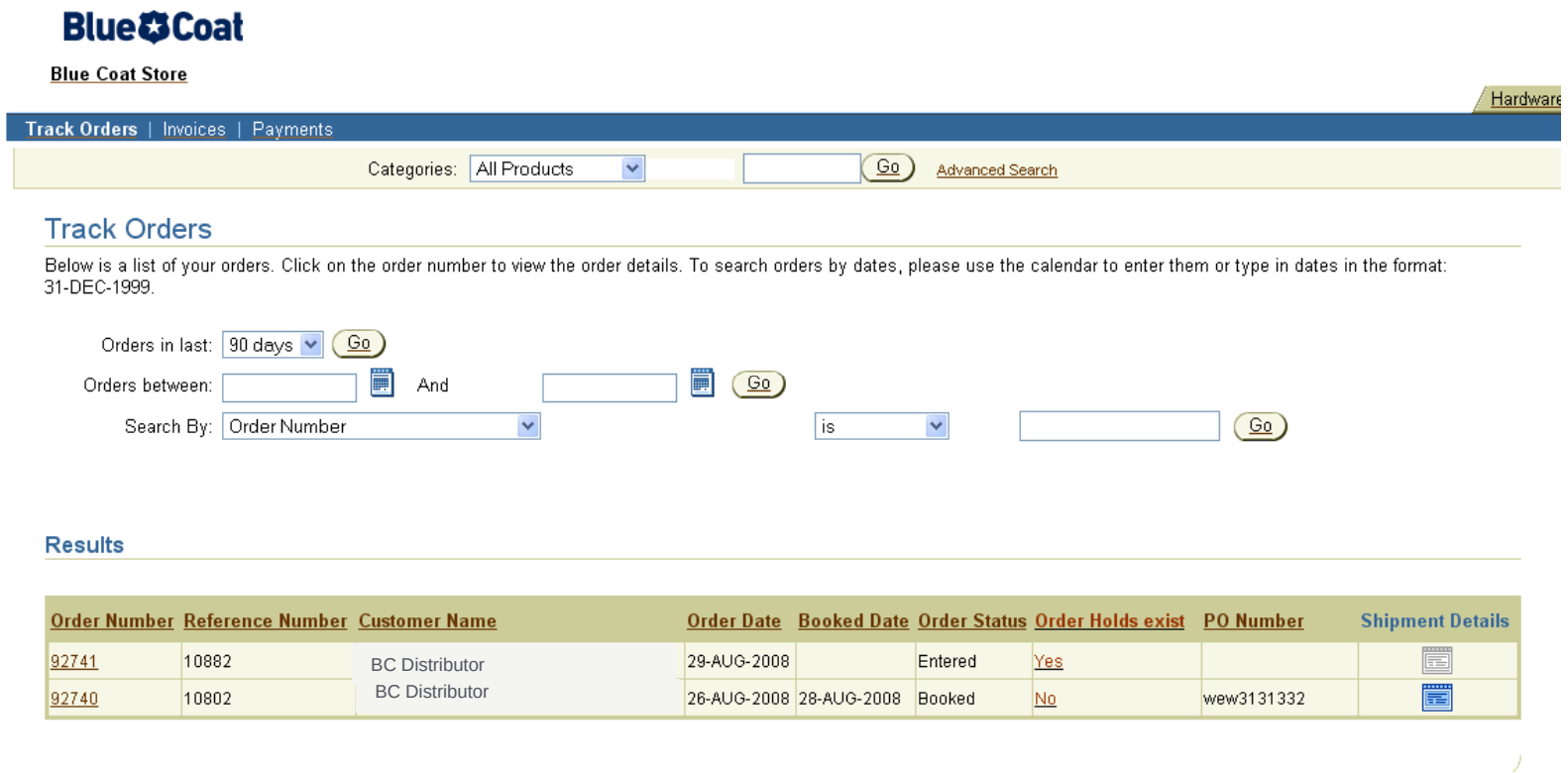
Track Orders



Order Details

View Invoices

Invoices

Please note that invoices for an order are generated only after fulfillment. To search invoices by dates, please use the calendar to enter them or type in dates in the format: 31-DEC-1999.

Invoices in last: [ ] Go

Invoices between: 01-JAN-2007 And 01-JAN-2008 Go

Search By: Invoice Date greater than [ ] Go

Results

Previous 1 - 50 Next 50

Invoice Number	Invoice Date	Type	Original Amount	Amount Due	Due Date	PO Number	Applied Amount	Payment Details
12071707	01-JAN-2008	Invoice	Items $1,799.25 Shipping $0.00 Tax $0.00 **Total $1,799.25**	$0.00	01-MAR-2008	B196870	$1,799.25	
12071708	01-JAN-2008	Invoice	Items $22,056.75 Shipping $0.00 Tax $0.00 **Total $22,056.75**	$0.00	01-MAR-2008	B196915	$22,056.75	
12071781	01-JAN-2008	Invoice	Items $127,801.24 Shipping $0.00 Tax $0.00 **Total $127,801.24**	$0.00	01-MAR-2008	B196904	$127,801.24	

Blue Coat

View Invoice Details

Invoice Details for Invoice Number 12071707

Invoice Number: 12071707
Invoice Date: 01-JAN-2008
Type: Invoice
Original Amount: $1,799.25
Amount Due: $0.00
Due Date: 01-MAR-2008
PO Number: B196870

Line Number	Description	Quantity	Selling Price	Total	Type
1	RNW-SVG-SG800-1-1YR	1	$1,237.50	$1,237.50	Line
1		1		$0.00	Tax
2	RNW-SVG-AV400-E1-1YR	1	$561.75	$561.75	Line
2		1		$0.00	Tax

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Track Payments

Payments

Please note that payments for an order are reflected only upon actual receipt. To search payments by dates, please use the calendar to enter them or type in dates in the format: 31-DEC-1999.

Payments in last: [ ] Go

Payments between: 24-SEP-2001 And 24-SEP-2008 Go

Search By: Receipt Date | greater than | [ ] Go

Results

Previous 1 - 50 Next 50

Payment Number	Customer Name	Receipt Date	Type	Payment Amount	Unapplied Amount	Due Date
00722200926	BC Distributor	23-MAY-2008	Cash	$748,998.59	$0.00	23-MAY-2008
00722234053	BC Distributor	22-APR-2008	Cash	$1,140,356.21	$0.00	22-APR-2008
080404237875	BC Distributor	04-APR-2008	Cash	$722,765.36	$0.00	04-APR-2008
080320222948	BC Distributor	20-MAR-2008	Cash	$1,495,569.54	$0.00	20-MAR-2008
00722241241	BC Distributor	04-MAR-2008	Cash	$1,917,690.52	$0.00	04-MAR-2008
00722236580	BC Distributor	05-FEB-2008	Cash	$72,908.82	$0.00	05-FEB-2008
080131245310	BC Distributor	31-JAN-2008	Cash	$794,955.44	$0.00	31-JAN-2008
00722426886	BC Distributor	22-JAN-2008	Cash	$714,371.13	$0.00	22-JAN-2008
00722203101	BC Distributor	04-JAN-2008	Cash	$910,556.75	$0.00	04-JAN-2008
071220256961	BC Distributor	20-DEC-2007	Cash	$1,023,823.24	$0.00	20-DEC-2007

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Track Payment Details

Payment Details for Payment Number 00722234053

Payment Number: 00722234053
Customer Name: BC Distributor
Payment Amount: $1,140,356.21
Type: Cash
Applied Amount: $1,140,356.21
Receipt Date: 22-APR-2008
Due Date: 22-APR-2008
Unapplied Amount: $0.00

Previous 1 - 50 Next 50

Payment Number	Type	Original Amount	Amount Due	Amount Applied	Date Applied	Status	Applied Against Invoice
00722234053	Credit Memo	$-899.75	$0.00	$-899.75	23-APR-2008	Closed	10001459
00722234053	Credit Memo	$-247.50	$0.00	$-247.50	23-APR-2008	Closed	10001415
00722234053	Credit Memo	$-2,100.00	$0.00	$-2,100.00	23-APR-2008	Closed	10001413
00722234053	Credit Memo	$-2,828.00	$0.00	$-2,828.00	23-APR-2008	Closed	10001408
00722234053	Credit Memo	$-980.00	$0.00	$-980.00	23-APR-2008	Closed	10001407
00722234053	Credit Memo	$-10,802.00	$0.00	$-10,802.00	23-APR-2008	Closed	10001383
00722234053	Credit Memo	$-547.50	$0.00	$-547.50	23-APR-2008	Closed	10001368
00722234053	Credit Memo	$-297.50	$0.00	$-297.50	23-APR-2008	Closed	10001367
00722234053	Credit Memo	$-686.00	$0.00	$-686.00	23-APR-2008	Closed	10001362
00722234053	Credit Memo	$-400.00	$0.00	$-400.00	23-APR-2008	Closed	10001358
00722234053	Credit Memo	$-336.00	$0.00	$-336.00	23-APR-2008	Closed	10001349
00722234053	Credit Memo	$-1,816.50	$0.00	$-1,816.50	23-APR-2008	Closed	10001306

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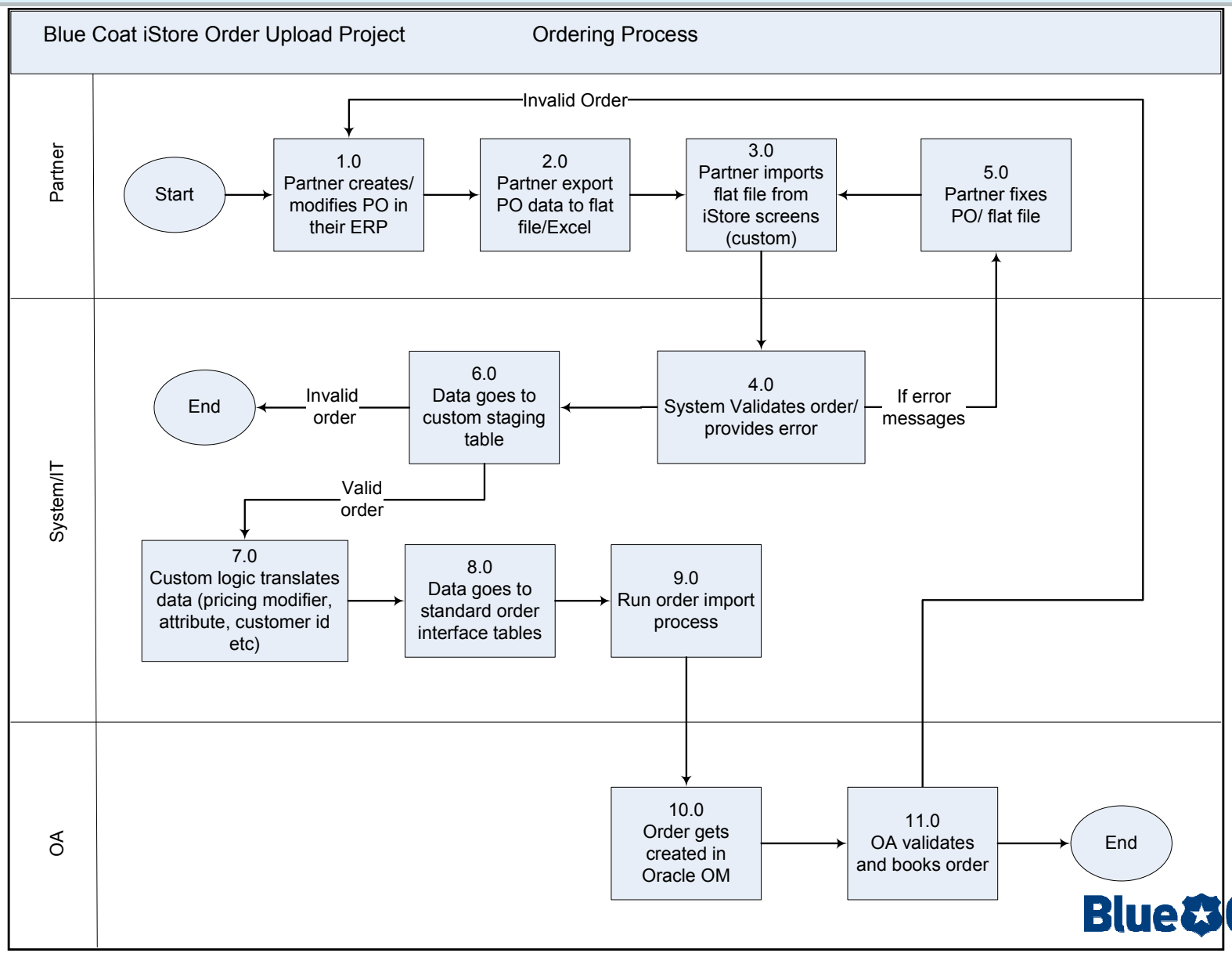
Process Diagram



Data validation Examples

- Almost a 100 validations were built in to the system
  - Mandatory fields must be entered
  - Format validations
  - Conditional validations
    - Validate one field based on the value of another field
  - List of Values validation
    - E.g. Item numbers must be valid active
  - Business logic validations
    - Pricing and discounting calculations
    - Start and end dates for service renewals

BlueCoat

From High Touch Order Entry to No Touch Automation

Phase 1

Order Upload Capability for North America Partners
Orders are Created in Entered/Draft status
Customer Creation is manual

Phase 2

Automated Service Renewal Process
Enhanced Portal Messages and visibility to shipping details
Order Upload capability for EMEA/LATAM Partners

Phase 3

Integration with Customer Master–Search and Create Customer, Addresses and Contacts
Auto Book Sales Orders further enabling “No Touch Automation”
Provides anytime access to order statuses for Sales and Channel reps

Business Benefits

- User friendly portal for partner Order placement
- Eliminates manual order entry and the need to hire additional resources to support growth
- Efficient/Quality Order Entry
- Improved Order to Receipt Cycles
- Higher Order Volume Processing Capability
- Improved incoming and Booked order quality
- Visibility to Order Status

Summary

- Implementation Duration: 9 Months
- Significant Reduction in Receipt to Book Lead Times
  - New Orders by : 40%
  - Renewals by : 80%

Turn: Receipt to Booked (Days)				
All Orders	Q4'09	Q1'10	Q2'10	Q3'10 To Date
New-Clean	1.65	1.14	0.73	0.64
Renewal-Clean	3.15	2.06	0.72	0.60
BlueStore Orders				
New-Clean	0.87	0.65	0.44	0.52
Renewal-Clean	3.38	1.50	0.50	0.59
% of WW orders on BlueStore	5%	23%	35%	52%

Contact Info

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