

ORACLE®

**Oracle Policy Automation Connector for
Oracle CRM On Demand 10.3.0
Features and Benefits**



New! Oracle Policy Automation Connector for Oracle CRM On Demand

If you...

- ➔ ...want to improve conversion of prospects into customers...
- ➔ ...need to differentiate yourself from your competitors...
- ➔ ...have challenges training your staff for complex customer service interactions...
- ➔ ...need a cost effective solution to improve how quickly you update systems for new regulations or market conditions...

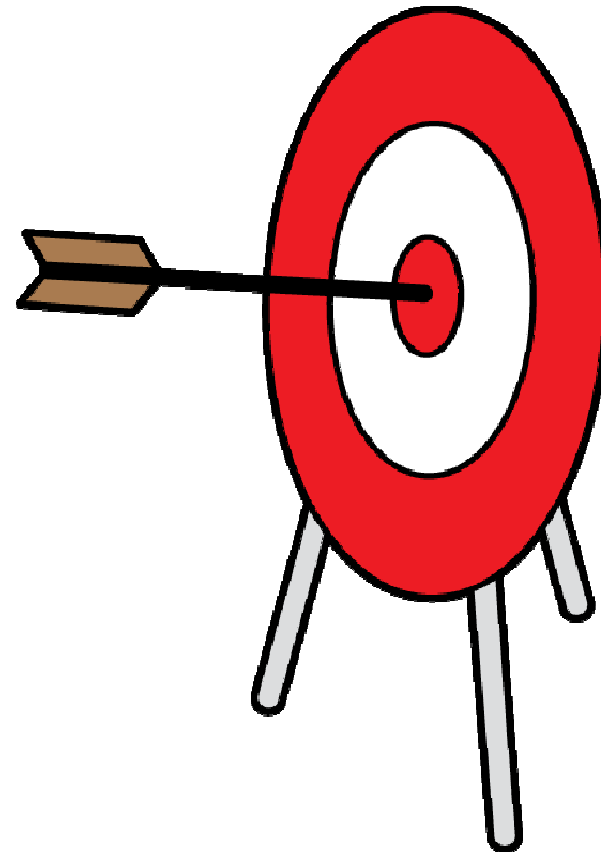
...then now is a great time to start using Oracle Policy Automation with Oracle CRM On Demand!



Introducing:

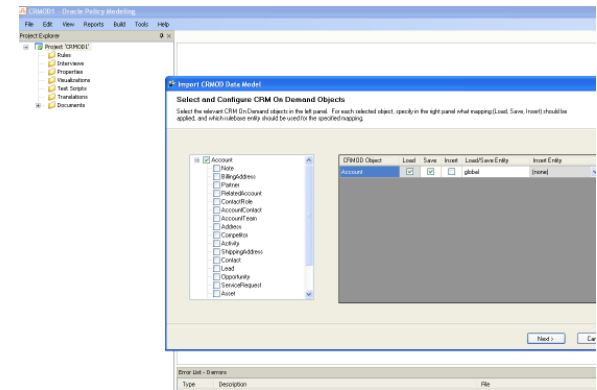
Oracle Policy Automation Connector for CRM On Demand

- Highlights include:
 - ✓ **Import Wizard for OPM**
 - ✓ Quickly start authoring rules against CRMOD data mapping
 - ✓ Allows CRMOD data to pre-seed an interview and update CRMOD with results
 - ✓ **Fast, simple deployment of rules**
 - ✓ Single file contains rules, interview screens and data mapping
 - ✓ Simple integration of OPA interviews into CRMOD UI



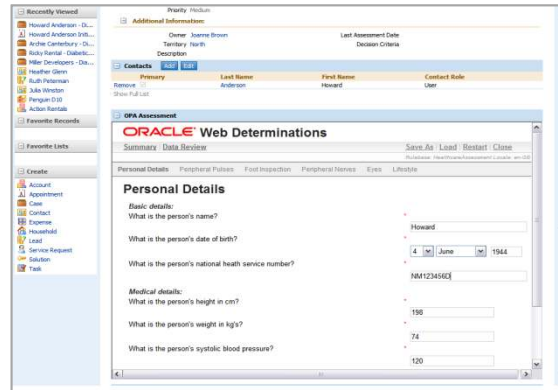
Key advantages of the Connector

Simple Fast Implementations



- Simple wizard to get started with CRMOD data model
- Rule authoring and testing performed standalone in Oracle Policy Modeling
- Integrate Web Determinations into CRMOD as an applet in less than 5 minutes

Low Cost Deployment



- Deploy to public or private cloud environment
- One policy modeling license included with connector
- Complete deployments of Web Determination in less than 30 days*

Cross Industry Support

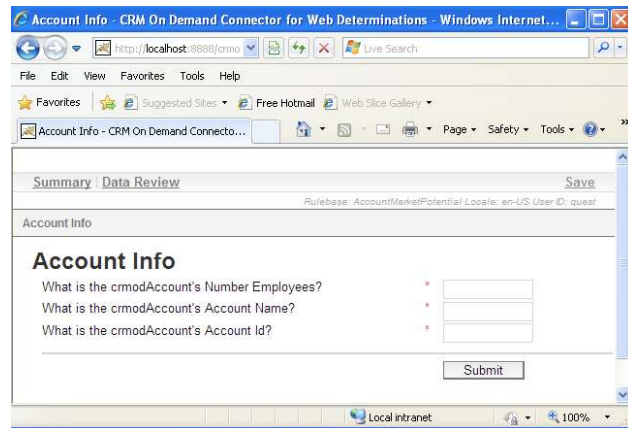


- Extend CRMOD for any industry where document-based rules are used
- Use OPA for decision-making with any CRMOD application
- Use OPA interviews to capture data even if not defined as CRMOD fields

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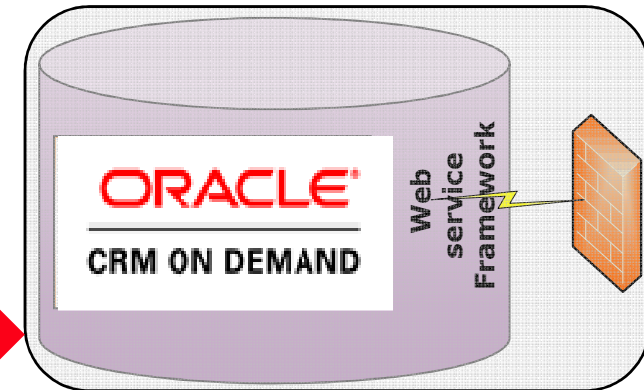
Overview of using OPA with CRMOD

Step 3

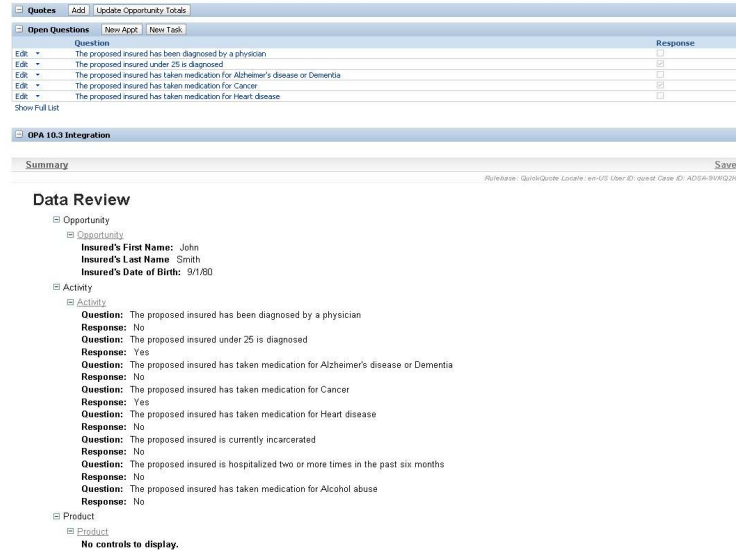


Load data from CRMOD into Web Determinations.
{Query using Rowld for the Business Object used}

Save inferred data back to CRMOD includes insert of new records



Step 4



Add an applet in CRMOD to display Web Determinations and automatically pass in the record context.

e.g. for an Opportunity the key data, such as contact name, value etc. can be pre-seeded into Web Determinations.

If a complete data set is passed WebDeterminations will display the outcomes value

Example Flow

2. Guided data collection commences, seeded with existing data from CRMOD

The screenshot shows the 'Personal Details' section of the Oracle Web Determinations application. The form is titled 'Personal Details' and includes sections for 'Basic details' and 'Medical details'. The 'Basic details' section contains the following questions and answers:

- What is the person's name?
- What is the person's date of birth?
- What is the person's national health service number?

The 'Medical details' section contains the following questions and answers:

- What is the person's height in cm?
- What is the person's weight in kg's?
- What is the person's systolic blood pressure?

3. Assessment completes after requesting minimum additional information required. Results saved back to CRMOD.

The screenshot shows the 'Assessment Summary' page of the Oracle Web Determinations application. The page is titled 'ORACLE Web Determinations' and includes a 'Data Review' section. The 'Assessment Summary' section is titled 'Management of Newly Diagnosed Diabetes' and includes the following text:

Important: Refer to [Shared Clinical Guidelines: Newly Diagnosed Patient with Diabetes](#)

- [3.1 Initial Assessment of Patient with Diabetes](#)
- [3.2 Impaired Glucose Intolerance and Impaired Fasting Glucose \(IFG\)](#)

Initial Assessment of Patient with Diabetes

- [Click here to perform an Initial Assessment for Diabetes](#)

The page also includes a table of 'Open Activities' and a 'Submit' button.

| Priority | Subject | Activity | Type | Due Date | Status | Alias |
|----------|---|----------|-------|------------|-------------|--------------|
| 1-High | Perform assessment to identify customer needs | Task | To Do | 26/02/2010 | Not Started | Joanne Brown |
| 2-Medium | Contact customer to review requirements | Task | Call | 26/02/2010 | Not Started | Joanne Brown |

Example Scenarios by Industry



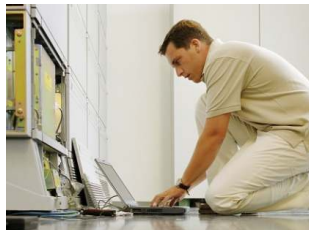
Insurance

- Self-service quoting for customers and brokers, and guided sales agent quoting
- Risk classification and premium calculations
- Claims adjudication and payment calculations
- For property, life and health insurance



Telecommunications

- Self-service quoting and bundling - includes compatibility and constraints
- Wholesale pricing
- Contract termination / separation
- Technical service charging



High Technology and Manufacturing

- Service billing
- Warranty processing
- Manufacturing process automation and consistency / escalation rules



Financial Services

- Self-service loan origination – needs analysis, eligibility, quotes
- Business policy adherence for rates, eligibility, exception management
- Regulatory compliance for marketing offers and transactional flags
- Tailored to region- and corporate-specific needs

Other

- Complex territory assignments
- Healthcare provider assessments
- Hosted field service management
- Multi-level marketing – sales and campaign mgmt

Technical Overview – Key Facts

Allows the extension of CRM On-Demand to use the decision making abilities of OPA

Utilizing Oracle Web Determinations to capture additional data as part of an interview, if needed, before updating CRMOD with a number of determined goals

The Connector utilizes the existing CRMOD web services framework to both pre-seed data into OPA and to update CRMOD with the outcomes

The user typically will be a call centre agent with some knowledge of the subject area underlying the content of the rules authored in OPA

The user will be guided through an interview in OPA so needs only to understand navigation of CRMOD and more generally web application to be able to produce a decision

The user will most commonly be launched into an interview screen inside Web Determinations with some session data pre-populated for them, then they will enter some data in various screens and then will trigger a save

The user can investigate any number of goals inferring many intermediate attributes, viewing a number of decision reports then the final save will transfer outcomes defined in the mapping back to CRMOD

Comparison with Salesforce.com

CRM on Demand with OPA

- Easy to incorporate business logic
 - Natural language description rather than reliance on code
 - Promotes business autonomy
 - Off-the-shelf integration without script
- Add intelligent interview flows

Word and Excel based

The image shows two overlapping windows. The background window is Microsoft Excel with a spreadsheet containing data for clients and products. The foreground window is Microsoft Word with a document containing a table of business logic rules.

| product name | product quantity | product price | product amount | product tariffication |
|--------------|------------------|---------------|--------------------------------|-----------------------|
| productA | <100 | priceA | product quantity*product price | tariff A |
| productA | <500 | priceA*90/100 | product quantity*product price | tariff A |
| productA | >500 | priceA*70/100 | product quantity*product price | tariff A |
| productB | <300 | priceB | product quantity*product price | tariff A |
| productB | <500 | priceB*80/100 | product quantity*product price | tariff A |
| productB | >500 | priceB*60/100 | product quantity*product price | tariff A |
| productC | <1000 | priceC | product quantity*product price | tariff A |
| productC | >1000 | priceC*75/100 | product quantity*product price | tariff A |

| Condition | MontantTotal | MontantFinal |
|-----------------|--------------|------------------------------------|
| depart usine | <10000 | MontantTotal |
| depart entrepot | <10000 | MontantTotal + 100 |
| livre | <10000 | MontantTotal + MontantTotal*15/100 |

force.com

- Business logic must be coded in hosted environment
- No independent testing of business logic available
- Rule-based interviews not available

Programming language based

Run-Time Governance

```
trigger leadNoDupEmails on Lead(before insert) {  
    Integer i=1;  
    while (true) i++;  
  
    if (Trigger.new.Email != NULL) {  
        if ((select count() from Lead where Email = :Trigger.new.Email) > 0) {  
            Trigger.new.Email.addError('A lead is using this eAddress');  
        }  
    }  
}
```

For More Information

Step-by-step guides to using the connector can be found in the Developer Help included in the downloadable installation package.



Oracle® Policy Automation Connector for CRM On Demand

Developer Help

Release 10.3

Topic Categories:

| | |
|-------------------------------|-----------------------|
| What's New? | Language Support |
| Get Started | Performance |
| Data Mapping | Security |
| Invoking Rules | Tutorials and Samples |
| Invoking Interviews | Accessibility |
| Outcomes and Decision Reports | Technical Reference |

V10.3
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Oracle Support

The Oracle Policy Automation forums are always open for your questions and comments. We love to hear from you!

Public site on OTN:

<http://forums.oracle.com/forums/forum.jspa?forumID=828>

Internal Oracle:

<http://myforums.oracle.com/jive3/forum.jspa?forumID=3918>