Integrating with Oracle Sales Cloud

Using Oracle Integration Cloud Service

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The Challenge of Cloud Integration

Oracle Sales Cloud is a key component of Oracle's Customer Experience (CX) portfolio by allowing companies to engage customers earlier and close deals faster. One of reasons Oracle Sales Cloud provides these earlier and faster benefits is due to pre-built integration across the entire sales lifecycle, which spans many disciplines including sales, service, marketing, configure/price/quote, and more. Pre-built integrations within the CX applications include the ability to see contact's digital profile from within Oracle Sales Cloud (Marketing Cloud integration), manage the complete lead-to-opportunity-to-quote process on your tablet and laptop (CPQ Cloud integration), and see service issues within the Oracle Sales customer 360 (Service Cloud integration). Furthermore, you can navigate quickly from Oracle Sales Customer Center or opportunity records to Seibel quotes (Siebel integration). This deep level of integration allows for immediate access to data across CX applications as well as some Oracle on-premises applications.

As your integration requirements grow, you can complement these CX pre-built integrations by seamlessly adding Oracle Integration Cloud Service to bring you to the next level.   For example, when you need to transform data between applications (modify it to conform to the requirements of the receiving application), integrate with non-Oracle applications or are looking to centralize and standardize all of your integration into a single integration platform, Oracle Integration Cloud Service is the perfect complement to the pre-built integrations available within the Oracle CX applications.

Barriers of isolation between other Customer Relationship Management (CRM) applications, Enterprise Resource Planning (ERP), Configure Price Quote (CPQ) and other applications are no longer acceptable in a world where sales reps need immediate access to customer and prospect information. And what about "hot" leads needing an immediate quote and other sales-related inquiries? A study by InsideSales.com found that 35 to 50 percent of sales go to the vendor that responds first. In order to respond rapidly you need a seamlessly connected flow of information from Oracle Sales Cloud, to your quoting module, to your ERP system, and back to Oracle Sales Cloud.

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Delivering quotes quickly has never been easy, due in part to the perennial challenges associated with integrating information from multiple applications. Today, integration has become more complex with the influx of so many new cloud applications. Because it is relatively easy to adopt new SaaS

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[1] Source: InsideSales.com http://www.circlesstudio.com/blog/close-more-b2b-deals-with-digital-lead-management-process/

applications, individual departments and lines of business (LOBs) such as sales, marketing, and shipping often deploy apps with little or no involvement from the IT department—such as the sales department with a new cloud-based CRM system. These LOBs love the rapid ramp-up of cloud applications, but often confront new levels of complexity when it comes to integrating these cloud-based assets with other enterprise information systems. At many organizations, the IT department is suddenly surrounded by a wide array of new SaaS applications (Oracle and non-Oracle) that urgently need to be integrated to existing on-premises applications. What's needed is an easy-to-use integration platform that enables LOBs and IT professionals to quickly assemble the necessary connections—using intuitive integrations and leveraging the latest innovations by Oracle. Oracle has the answer with Oracle Integration Cloud Service.

Introducing Oracle Integration Cloud Service

Until recently, most integration tools were too complicated for LOB users, resulting in costly delays and error-prone attempts at application integration. And while there is wide variation in the quality of SaaS-embedded integration tools across all vendors, too many are too limited to address real-world business requirements. Furthermore, these integration tools lack recent innovations that dramatically simplify integration projects such as built-in guidance recommendations, pre-integration, and more.

SaaS application Integration requires more than simply connecting a few web services calls. You must also consider important issues related to authentication, session management, transformation mappings, and more. Additional challenges include the isolation of Platform as a Service (PaaS) from the SaaS applications, resulting in potential errors due to version number mismatches, additional upfront set-up, and tedious security work. Many of these challenges are resolved by letting Oracle Integration Cloud Service manage these issues for you.

Oracle Integration Cloud Service is a simple and powerful cloud-based integration platform that maximizes the value of investments in SaaS and on-premises applications. It includes an intuitive, web-based integration designer for point-and-click integration between applications. It also includes a rich monitoring dashboard that provides real-time insight into transactions. Oracle Integration Cloud Service is known as an *integration platform as a service* (iPaaS) and was developed to simplify integration projects.

ERP Application Integration with Oracle Sales Cloud

Opportunity to Quote / Opportunity to Order

As any seasoned field-based account manager can tell you, delayed quotes can often lead to lost revenue. In the era of instant-on, subscription-based SaaS, taking several days to deliver an accurate quote to a customer is unacceptable. A common scenario arises when a sales professional enters information into a CRM system and then a business user has to manually re-input that information into an order management application, which not only delays the quote but potentially introduces errors to the record. While some applications automatically share data, there are typically too many different applications from disparate vendors to make these seamless across all of the required CX and non-CX applications. Oracle Customer Data Management (CDM) plays a key role for the data quality and cleansing aspects, combined with Oracle Integration Cloud Service to bring these disparate applications into a unified, real-time, and responsive solution.

The sales lifecycle can be split into 3 sub-processes: "Lead to Opportunity," "Opportunity to Order," and "Order to Invoice," as shown in the diagram below. These sub-processes require seamless integration to ensure that data flows smoothly, accurately, and without error. As you can see on the left side of the diagram, a marketing application such as Oracle Marketing Cloud can be used in close conjunction with Oracle Sales Cloud to empower marketing personnel to track the progress of each opportunity. Updates within Oracle Sales Cloud instantly trigger updates in Oracle Marketing Cloud. As the opportunity is created, configured, and pricing is approved, further integration is required to ensure the upstream data from Oracle Sales Cloud flows directly into Oracle CPQ Cloud. Next an ERP application (such as Oracle E-Business Suite or Oracle JD Edwards) can capture relevant opportunities, streamline the order-creation cycle, and generate an invoice. Non-Oracle applications can also be included as an integral part of the process integration flow. Leverage the appropriate pre-built applications within the CX applications combined with the single platform solution of Oracle Integration Cloud Service to meet your objectives.
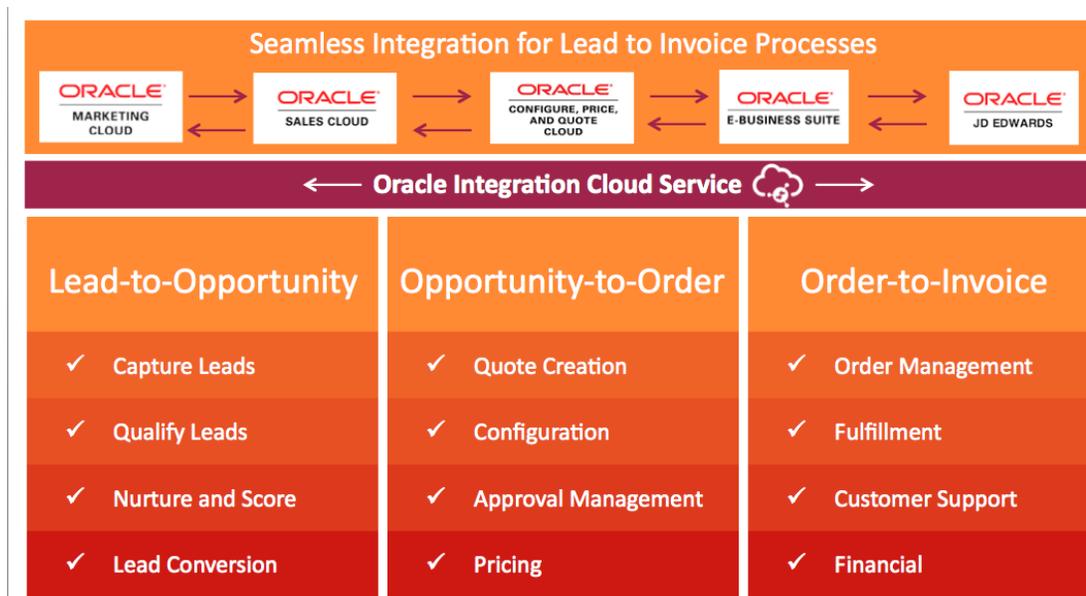

Figure 1: Oracle Integration Cloud Service integrates three key sub-processes: "Lead to Opportunity," "Opportunity to Order," and "Order to Invoice," bringing real-time visibility to the entire sales lifecycle.

Oracle Integration Cloud Service and pre-built integrations within the CX applications automate the fundamental steps in the sales cycle, freeing business users to only focus on rarely occurring complex exception management rather than basic data entry and integration. It leverages pre-built adapters and process flows from Oracle and its partners to streamline the flow of data from Oracle Sales Cloud to Oracle CPQ, Oracle E-Business Suite, Oracle JD Edwards, and other popular applications. JD Edwards order management information for advanced pricing, fulfillment, and outbound inventory management are no longer siloed from other key business applications. Likewise, order management technology within Oracle CPQ Cloud and Oracle E-Business Suite can manage orders and opportunities from Oracle Sales Cloud.

As shown in Figure 2, when account managers interact with Oracle Sales Cloud they also gain access to customer master data and can create orders in the ERP system. Oracle Integration Cloud Service and the Oracle CX application pre-built integrations synchronize updates to Oracle E-Business Suite, Oracle JD Edwards, and other back-end applications. This cloud service can automate manual, error-prone processes, enabling account managers to quickly deliver quotes to prospects.
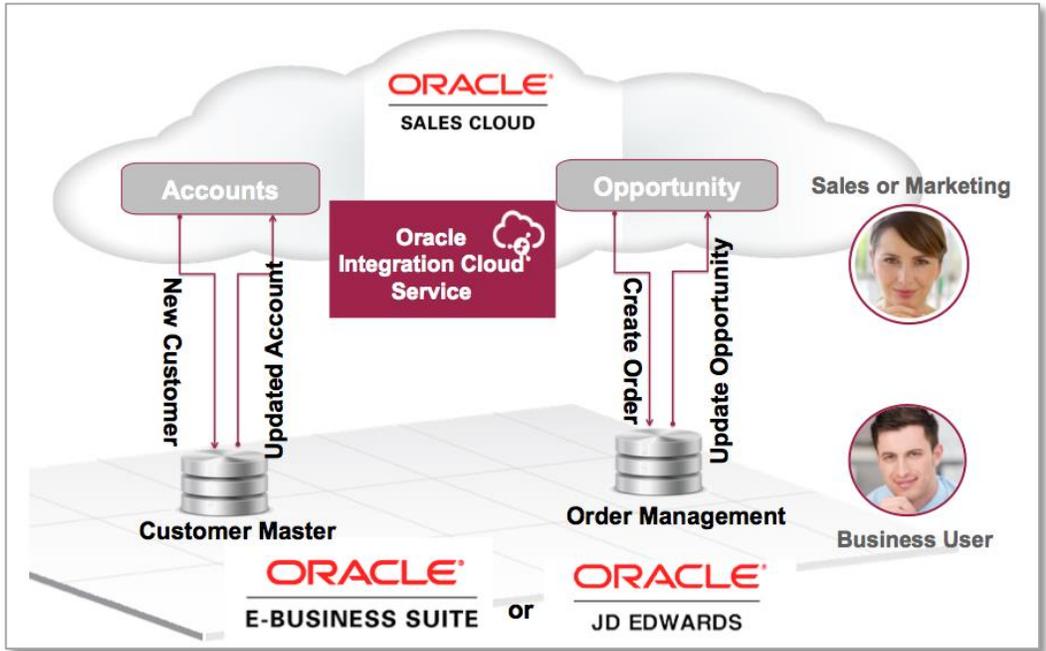
Figure 2: When a sales representative enters account information into Oracle Sales Cloud, it updates the master customer record and creates an order in Oracle E-Business Suite, with automatic synchronization back to Oracle Sales Cloud.

When account managers enter information about new opportunities into Oracle Sales Cloud they see the following screen:
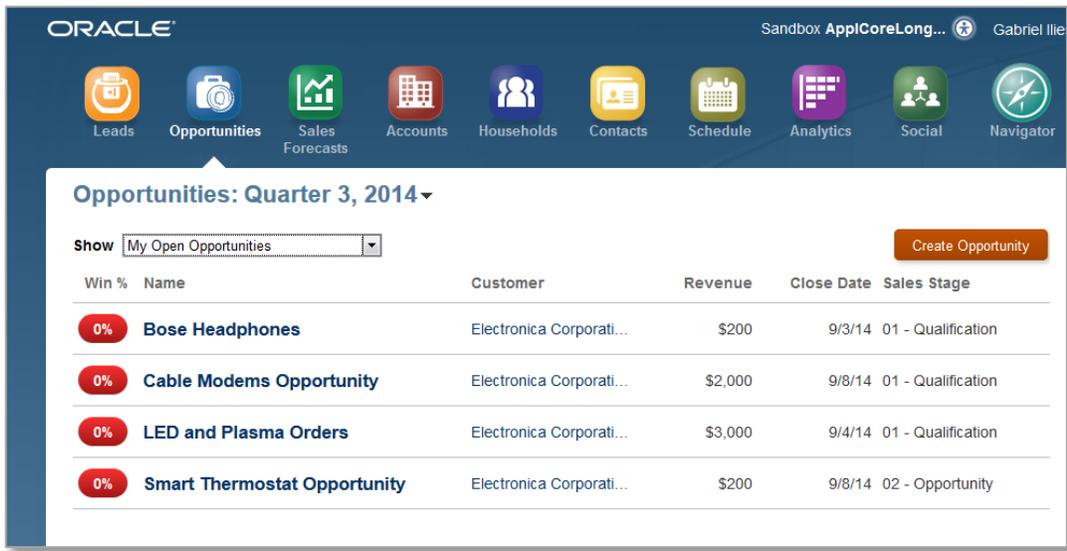

Figure 3: Creating "Opportunities" in Oracle Sales Cloud prior to the integration of data with Oracle CPQ Cloud and Oracle E-Business Suite.

For example, the "Cable Modems Opportunity" is a $2,000 stage 1 opportunity. In most cases, the account manager would fill in the opportunity and send it to the order management application to begin a lengthy and error prone process to re-enter the data into the quoting system. Lack of integration between the front-end CRM application and back-end applications for configure, price, and quote means that the account manager must exchange email messages with business associates until the record is entered and errors are corrected. The opportunity can quickly turns cold, allowing competitors to swoop in to slow down the sales cycle or win the opportunity.

Instead of manually re-entering data into the quoting system, the relevant information is synchronized with the associated back-end applications. Figure 4 reveals the "Cable Modems Opportunity" in Oracle CPQ Cloud image. Thanks to automatic data integration, there is no need for manual intervention and minimal time delays.
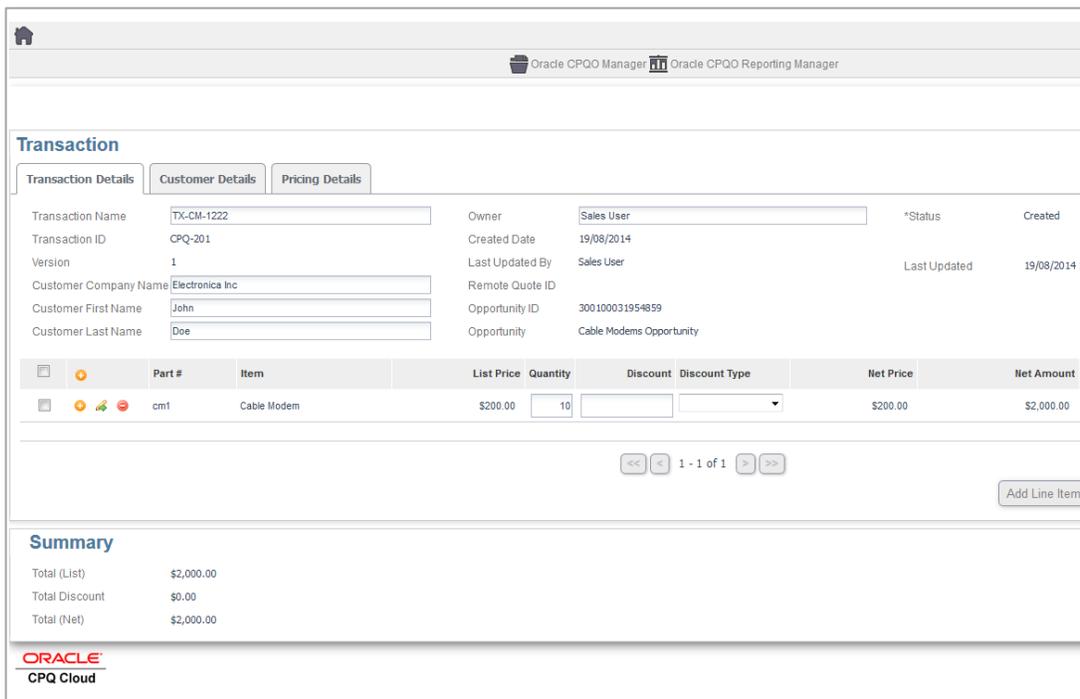

Figure 4: Oracle Integration Cloud Service creates a quote and automatically synchronizes the data between Oracle Sales Cloud and Oracle CPQ Cloud.

In some cases, customers also use Oracle E-Business Suite to supply additional order details. In the image below, this opportunity was passed to Oracle E-Business Suite with no need for manual intervention.
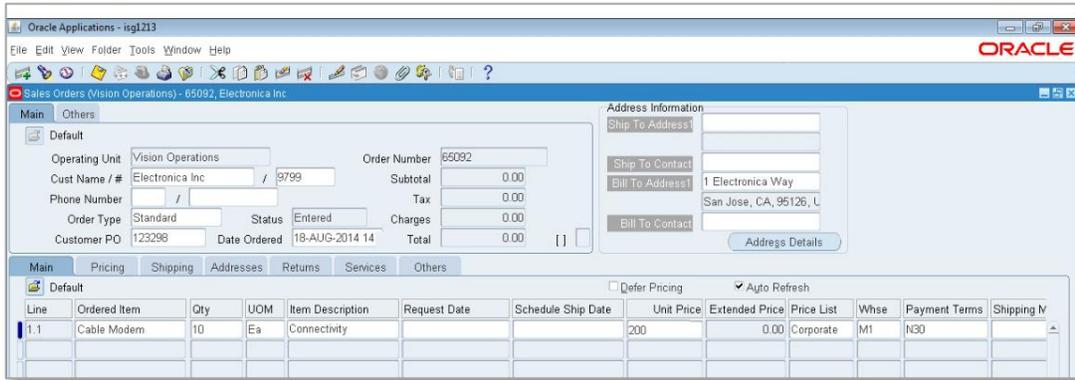
Figure 5: Once account managers enter customer opportunity information into Oracle Sales Cloud the data is passed to Oracle CPQ Cloud to create a quote and then on to Oracle E-Business Suite for reconciliation with pertinent modules in the ERP system.

Case Study: Avaya - Opportunity to Order – Oracle Sales Cloud to ERP Integration

Avaya is a recognized innovator and global leader in business communications software, systems and services. The company provides technologies for unified communications and collaboration, contact center and customer experience management, and networking, along with related services to large enterprises, midmarket companies, small businesses, and government organizations around the world. Avaya is continually looking for ways to innovate faster, streamline internal operations, and lower costs. Avaya brings in 75 percent of its revenue from approximately 11,000 partners, requiring real-time integration between its SaaS-based CRM application and its Enterprise Resource Planning (ERP) software. Unfortunately, Avaya's (non-Oracle) CRM application required massive customization to integrate with this ERP system. After a thorough evaluation of options, Avaya determined that they could reduce the amount of time required to make these customizations by 80 percent and reduce costs by 30 percent by replacing the existing CRM application with Oracle Sales Cloud. The key to the success of this project entailed a graceful transition from the legacy CRM system to Oracle Sales Cloud since an overnight "flip the switch" approach was too risky. Oracle Integration Cloud Service make it possible to run both CRM systems simultaneously and to synchronize account information during the implementation of Oracle Sales Cloud.

According to a presentation that Avaya delivered at the Oracle OpenWorld 2015 Conference, the key reason they selected Oracle Integration Cloud Service was because of its out-of-the-box adapters that make it easy to connect Oracle Sales Cloud to Salesforce.com and other third-party SaaS applications, as well as a long list of on-premises application adapters, including links to SAP ERP applications. Other factors that motivated Avaya to use Oracle Sales Cloud included its support for the latest in security standards, easy to build and maintain integrations, and the ability to quickly scale up and down based on usage.

Figure 6: Avaya Senior Vice President and Global Chief Information Officer Fari Ebrahimi explains how Oracle Integration Cloud Service reduced customizations by 80 percent and reduced costs by 30 percent as they integrate Oracle Sales Cloud, Oracle Marketing Cloud, and Oracle Social Relationship Management (SRM) Cloud. [Watch the Webcast.]

CRM Application Integration with Oracle Service Cloud

Sales and Service Interactions

Consider the following scenario. A small-business customer has an issue with a phone system. He calls the vendor to report the problem and speaks to a customer support representative. The rep uses Oracle Service Cloud to enter the incident, update the customer record, and order a replacement phone to be drop-shipped to the customer location. Order fulfillment is handled by the ERP system. Thanks to behind-the-scenes integrations that can be developed within Oracle Integration Cloud Service, these updates can be synchronized with Oracle Sales Cloud and the ERP system to ensure that the entire account team is aware of current activity within the account. For example, the customer service rep might note that the customer is using an outdated phone system and suggest that a sales representative follow up to inform the customer about a current promotion on a new system.

Figure 7: Oracle Integration Cloud Service can be used to develop integrations that enable sales reps and service reps to stay in sync while enforcing data quality in their respective systems. For example, it maps "Accounts" in Oracle Sales Cloud to "Organizations" in Oracle Service Cloud.
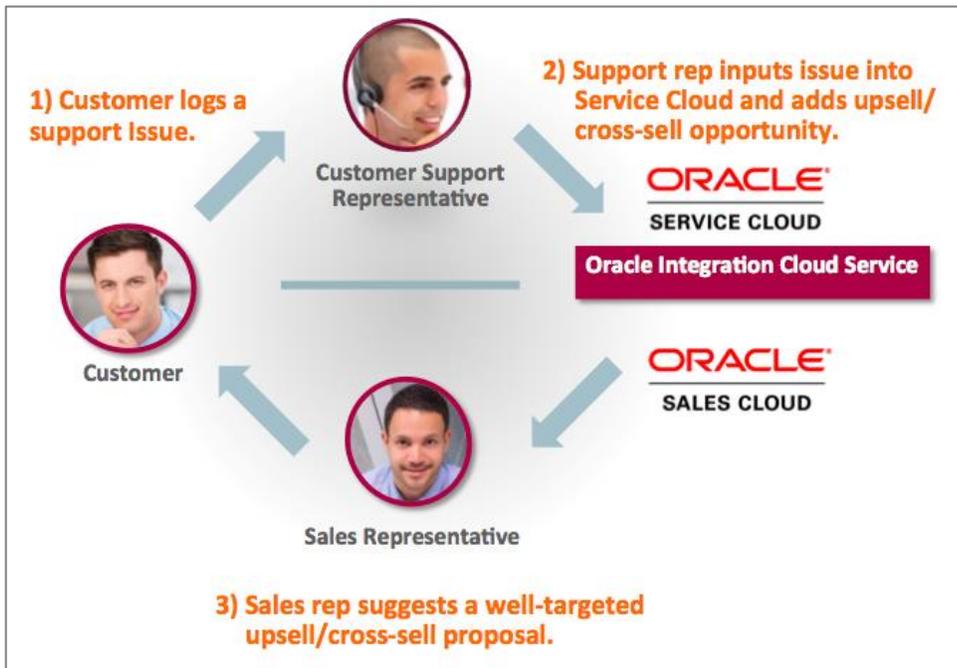

Figure 8: Oracle Integration Cloud Service keeps all members of an account team in sync so that customers are satisfied and new opportunities don't slip through the cracks.

Sales reps that use Oracle Sales Cloud might choose to be notified only if a prospect has a severity 1 or severity 2 issue in Oracle Service Cloud. This integration will keep them apprised of problems within their accounts so they know when to pursue targeted upsell/cross-sell opportunities, and how to respond to account issues. Similarly, a sales rep might learn of a problem that she would like her technical support team to address. She can create a service request in Oracle Sales Cloud and it will be synchronized to Oracle Service Cloud automatically, so the support team can handle the issue immediately.

Oracle Integration Cloud Service

Prebuilt Integrations

Traditionally, software integration is a manual task requiring design, testing, debugging, and deployment to put new interfaces into production. Oracle Integration Cloud Service lowers the cost of building and maintaining complex business logic with a point-and-click interface. In addition, Oracle is introducing prebuilt integrations through the Oracle Cloud Marketplace. Customers can browse, search, and select these business objects and deploy them without needing to understand the underlying technical details, reducing time-to-market for new integrations among cloud and on-premises applications. For example, a prebuilt integration might synchronize activities between Oracle Service Cloud and Oracle CPQ Cloud so that field service personnel have instantaneous visibility into orders for replacement parts and the status of customer requests. There is a growing collection of these prebuilt integrations available in the Oracle Cloud Marketplace, developed by Oracle and its partners. You can use these integrations as-is or modify them with Oracle Integration Cloud Service to jumpstart your projects and accelerate time-to-market.

Automatic Mapping of Data and Functions

With Oracle Integration Cloud Service, developers may accept recommendations for connections among objects to map and transform data from one SaaS app to the next. For example, it understands the similarities between "Org" in one application and "Account" in another. This inherent knowledge simplifies one of the most complex, error-prone, and time-consuming tasks in any integration project: trying to figure out how to map data fields from one application to another. Oracle Integration Cloud Service makes it easy to define mappings that range from simple data assignments to complex expressions and computations.
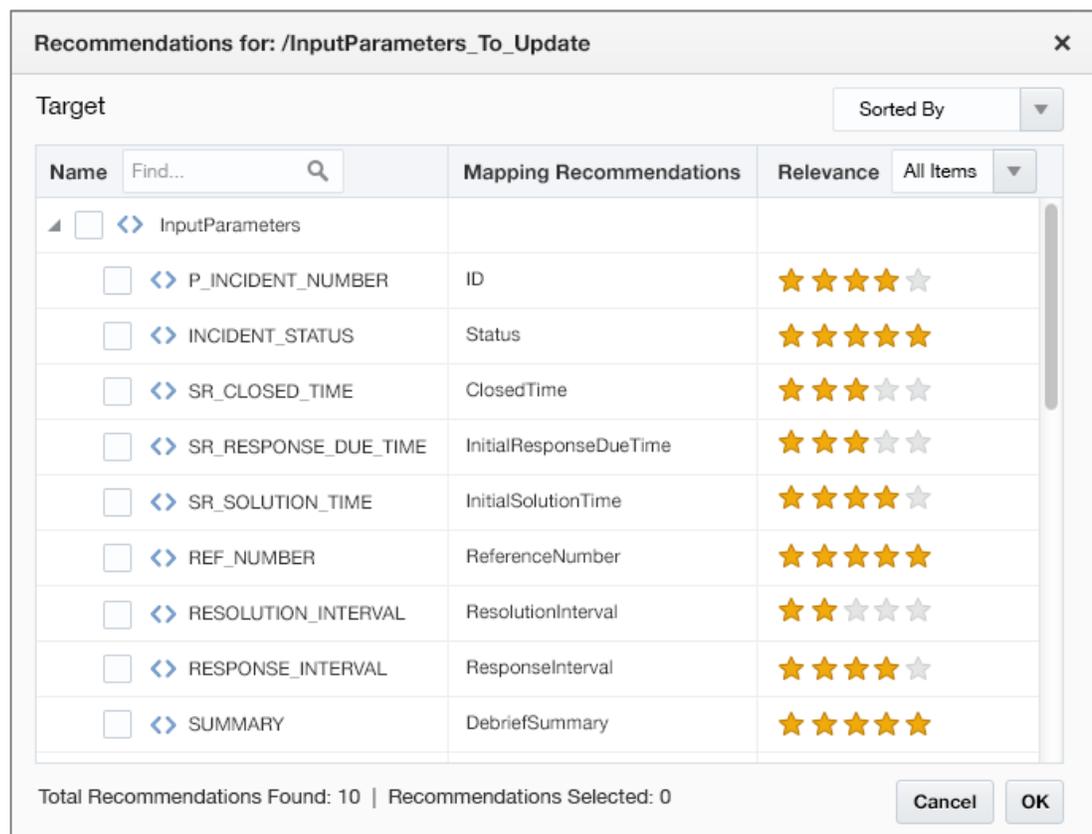
Recommendations for: /InputParameters_To_Update ✕

Target   Sorted By ▼

Name	Find... 🔍	Mapping Recommendations	Relevance	All Items ▼
◢ ☐ <> InputParameters				
☐ <> P_INCIDENT_NUMBER	ID	★★★★☆		
☐ <> INCIDENT_STATUS	Status	★★★★★		
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☐ <> SR_RESPONSE_DUE_TIME	InitialResponseDueTime	★★★☆☆		
☐ <> SR_SOLUTION_TIME	InitialSolutionTime	★★★★☆		
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☐ <> RESPONSE_INTERVAL	ResponseInterval	★★★★☆		
☐ <> SUMMARY	DebriefSummary	★★★★★		

Total Recommendations Found: 10 | Recommendations Selected: 0   Cancel   OK

Figure 9: Oracle Integration Cloud Service automates the matching and merging of application objects among multiple applications, on-premises and in the cloud. The more stars, the higher likelihood that the recommendation is correct. In this case, based on the experience and published results of many customers, Oracle Integration Cloud Service recommends that "INCIDENT_STATUS" maps to "Status" in the other application.

Accommodating Hybrid Cloud Environments

Whether you choose to deploy your Oracle applications in a public or private cloud setting, you can take advantage of a uniform set of components for mapping, data enrichment, integration monitoring, and lookup tables.

Oracle has developed integration solutions that share common architecture, standards, and products between cloud and on-premises solutions. Oracle Integration Cloud Service leverages the proven components of Oracle SOA Suite such as Oracle Service Bus and its many application adapters to simplify migrations from on-premises systems to cloud-based systems and from public clouds to on-premises deployments.

Comprehensive Connectivity

Oracle Integration Cloud Service contains an extensive library of application adapters. It reduces complexity and masks the differences among applications that require integration. For example, each vendor may require unique security protocols and methods for session management. The Oracle adapters resolve these differences with an intuitive, step-by-step, standardized way of integrating every application. This library of adapters makes it easy to integrate with both cloud and on-premises applications such as Oracle Sales Cloud, Oracle Service Cloud, Oracle

Marketing Cloud, Oracle E-Business Suite, Siebel, PeopleSoft, JD Edwards and many other Oracle and non-Oracle applications, including Salesforce and SAP, using out-of-the-box adapters and standard web services.
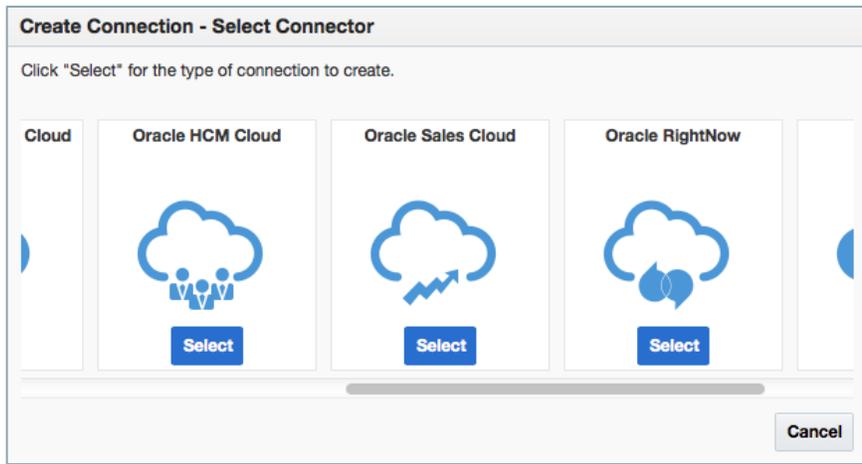

Figure 10: Auto association of Oracle Applications pre-populates the application connector list and pre-configures Oracle Integration Cloud Service using secure credentials.

Conclusion

Most integration platforms are too complex for LOB users to understand or use. Manually creating interfaces among cloud-based and on-premises applications can get complicated. Oracle Integration Cloud Service offers innovative methods for simplifying this process. It is a powerful, cloud-based integration platform that can help you maximize the value of your investments in SaaS and on-premises applications. Customers that have deployed Oracle Service Cloud can take advantage of a growing library of prebuilt integrations that connect cloud-based functions to other apps, so they don't have to start from scratch. These existing assets empower LOB managers to collaborate with integration experts and architects. They can also leverage crowd-sourced integration recommendations to further jumpstart integration. Oracle is the only technology company to provide these unique PaaS and SaaS solutions for public/private cloud and on-premises deployments.

Hardware and Software, Engineered to Work Together

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Authors: Bruce Tierney