Order to Cash Integration: Siebel and OSM Pack Ed 1

Oracle Siebel CRM

DURATION	MODULES	COURSE CODE
2 Days	**15 Lectures**	**—**

Course Overview

Order to Cash Integration: Siebel and OSM Pack Ed 1

What You Will Learn

Introduction

- Your Education Center
- Electronic Sign-In
- Introductions
- Course Objectives
- Course Agenda

Oracle AIA and Order to Cash Pre-built Integration: Overview

- Objectives
- Order to Cash Business Process: Key Communications Industry Challenges
- Order to Cash Business Process: Key Offer Design Challenges
- Order to Cash Business Process: Key Offer Delivery Challenges
- Oracle AIA: Overview
- Oracle AIA: Pre-Built Integrations for Communications
- Oracle AIA: Service Oriented Architecture (SOA)
- Order to Cash Pre-Built Integration: Overview
- Order to Cash Pre-Built Integration: Integration Packs
- Oracle Communications Order to Cash Pre-Built Integration: Installation
- Options
- Order to Cash Siebel CRM and BRM Pre-Built Integration Installation Options:
- Functionality
- Order to Cash Pre-Built Integration: Process Integrations
- Order to Cash Pre-Built Integration: Process Integration Flows
- Order to Cash Pre-Built Integration: Siebel CRM and OSM Business Flows

- Order to Cash Pre-Built Integration: Product Lifecycle Management
- Business Flow
- Order to Cash Pre-Built Integration: Order Lifecycle Management
- Business Flows
- Order to Cash Pre-Built Integration: Order Fallout Management
- Business Flows
- Order to Cash Pre-Built Integration: Architecture
- Order to Cash Pre-Built Integration Application Role: Siebel CRM
- Order to Cash Pre-Built Integration Application Role: OSM
- Order to Cash Siebel CRM and BRM Pre-Built Integration Option: Business
- Benefits
- Summary
- Quiz

Design Time Configuration

- Objectives
- OLM and OFM: Design Time Configuration Overview
- Configuring Siebel CRM for OLM
- Configuring Siebel CRM for OFM
- Configuring OSM
- Configuring BRM
- Configuring Oracle Fusion Middleware
- Configuring Oracle AIA for OLM
- Configuring Oracle AIA for OFM
- Setting Properties in the AIAConfigurationProperties.xml File
- Setting the Standard Properties in the AIAConfigurationProperties.xml File
- Setting the AIAConfigurationProperties.xml File Properties for OLM
- Setting the AIAConfigurationProperties.xml File Properties for OLM Services
- Configuring Domain Value Maps (DVMs): Overview
- Configuring DVMs for OLM
- Sales Order Status DVM
- Configuring Cross-References: Overview
- Configuring Cross References for OLM
- Delivered Routing Rules
- Integration Points
- Summary
- Quiz
- Practice 3: Verifying the Installation

Orders and Order Processing

- Objectives
- Product Offerings
- Product Model and Mapping
- Oracle Communications Order and Service Management (OSM) Mandatory Attribute
- Mappings

- Order Line-to-Product Specification Mapping
- Mapping Customer Order Lines to Fulfillment Flows
- Introduction to Orders
- Orders
- Order Components
- Order Types
- New Order
- First-Time Purchase Order
- Change Order
- Revision Order
- Follow-On Order
- Future-Dated Order
- Cancel Order
- Order Processing
- Order Capture: Overview
- Order Capture: Functional Flow
- Order Capture: Fulfillment Modes
- Qualify Order Subflow: TSQ
- Qualify Order Subflow: Functional Flow
- Deliver Order Subflow: Fulfillment Processing
- Deliver Order Subflow: Functional Flow
- Order Priority
- Cross-Order Dependencies
- Order Status Management
- Order Status Attributes
- Adding Extra Order Status Attribute Values
- Preserving Order Status Attribute Values
- Optimizing Order Status Change Propagation
- Status Attribute Design: Guidance Summary
- Summary
- Quiz

Billing Features

- Objectives
- Balance Groups
- Balance Groups: Concepts
- Service-Level Balance Groups: Functionality
- Service-Level Balance Groups: Configuration
- Service-Level Balance Groups: Methodology
- Service-Level Balance Groups: Tracking Services Separately at Run Time
- Service-Level Balance Groups: Multiple Billing Profiles at Run Time
- Service-Level Balance Groups: Service Transfer at Run Time
- Service-Level Balance Groups: Example of Service Transfer at Run Time
- Single-Phase Billing
- Two-Phase Billing

- Supporting Single Phase and Two-Phase Billing
- When to Use Single-Phase Billing
- When to Use Two-Phase Billing
- Time-Based Offerings
- When a Time-Based Offering Is Purchased in an Order
- Friends and Family
- Promotion on Invoice
- One-Time or Penalty Charges
- Summary
- Quiz

Order Lifecycle Management (OLM): Overview

- Objectives
- Order Lifecycle Management
- Order Lifecycle Management: Methodology
- Order Lifecycle Management: Functional Flow
- OLM Business Flows
- Use Case: Overview
- Use Case: Create Account
- Use Case: Select Promotions
- Use Case: Order Capture
- Use Case: Account Synchronization
- Use Case: Billing Synchronization
- Use Case: Balance Groups
- Use Case: Cross-References
- Summary
- Quiz

“Query Product Classes” Business Flow

- Objectives
- “Query Product Classes” Business Flow
- Overview
- High-Level Tasks
- All Tasks
- Siebel CRM Product Administrator Tasks
- Design Studio Cartridge Developer Tasks
- Querying Product Classes from Design Studio
- Querying Product Classes and Associated Attributes from Design Studio
- Effective Dates at Design Time
- Effective Dates at Run Time
- Business Flow Implementation: Overview
- Resources Used: Siebel CRM Services
- Resources Used: Industry Oracle AIA Components
- Services Provided
- QueryProdClassAndAttributesSCEReqCommsABCSImpl

- QueryClassificationListSiebelCommsProvABCSImpl
- QuerySpecificationListSiebelCommsProvABCSImpl
- QuerySpecificationValueSetListSiebelCommsProvABCSImpl
- Implementation Flow
- Summary
- Quiz
- Practice 7: “Query Product Classes” Business Flow

“Process Sales Order Fulfillment” Business Flow

- Objectives
- Overview
- Order Lifecycle Management: Functional Flow
- Business Flow Implementation
- Siebel CRM Service
- Industry Oracle AIA Components
- Services Provided
- ProcessSalesOrderFulfillmentSiebelCommsJMSConsumer
- ProcessSalesOrderFulfillmentSiebelCommsReqABCSImpl
- ProcessSalesOrderFulfillmentOSMCFSCommsJMSProducer
- “Process Sales Order Fulfillment” Business Flow
- Summary
- Quiz
- Practice 8: Create Customer and New Order

“Synchronize Fulfillment Order Billing Account” Business Flow

- Objectives
- Overview
- Interfacing Orders to Create Customer Data in the BRM Integration Flow
- Interfacing Customer Data to Billing
- Business Flow Implementation: Overview
- Customer Management Process Integration Services
- BRM Services
- Industry Oracle AIA Components
- Services Provided
- ProcessFulfillmentOrderBillingAccountListOSMCFSCommsJMSConsumer
- CommsProcessFulfillmentOrderBillingAccountListEBF
- Customer Account Creation in BRM
- Paying Hierarchy
- CommsProcessBillingAccountListEBF
- ProcessFulfillmentOrderBillingAccountListOSMCFSCommsJMSProducer
- Interfacing Orders to Create Customer Data in the BRM Integration Flow
- Summary
- Quiz
- Practice 9: Change Order

“Bill Fulfillment Order” Business Flow

- Objectives
- Overview
- Interfacing Orders to BRM: Creating and Updating Service Instances
- Interfacing Orders to BRM: Communicating Pricing Information
- Interfacing Orders to BRM: Communicating One-Time and Penalty Charges
- Interfacing Orders to BRM: Communicating Price or Discount Overrides
- Interfacing Orders to BRM: Communicating Service Identifiers
- Interfacing Orders to BRM: Communicating Price Lists
- Interfacing Orders to BRM: Communicating Siebel CRM Promotion
- Information
- Interfacing Orders to BRM: Rolling Back Transactions
- Business Flow Implementation: Overview
- BRM Services
- Industry Oracle AIA Components
- Services Provided
- ProcessFulfillmentOrderBillingOSMCFSCommsJMSConsumer
- ProcessFulfillmentOrderBillingBRMCommsProvABCSImpl
- ProcessFulfillmentOrderBillingBRMCommsAddSubProcess
- ProcessFulfillmentOrderBillingBRMCommsMoveAddSubProcess
- ProcessFulfillmentOrderBillingBRMCommsSuspendResumeSubProcess
- ProcessFulfillmentOrderBillingBRMCommsUpdateSubProcess
- ProcessFulfillmentOrderBillingBRMCommsDeleteSubProcess
- ProcessFulfillmentOrderBillingResponseOSMCFSCommsJMSProducer
- Interfacing Orders to Create Transaction Data in BRM
- Summary
- Quiz
- Practice 10: Revision Order

“Provision Order” and “Update Fulfillment Order” Business Flows

- Objectives
- Order Provisioning
- Creating Provisioning Orders
- Updating Fulfillment Orders
- Business Flow Implementation: Overview
- Industry Oracle AIA Components
- Services Provided
- ProcessProvisioningOrderOSMCFSCommsJMSConsumer
- ProcessProvisioningOrderOSMPROVCommsJMSProducer
- ProcessFulfillmentOrderUpdateOSMPROVCommsJMSConsumer
- ProcessFulfillmentOrderUpdateOSMCFSCommsJMSProducer
- OSM COM−to−OSM SOM Provisioning Sequence
- Summary
- Quiz

- Practice 11: Follow-On Order

“Update Sales Order” Business Flow

- Objectives
- “Update Sales Order” Process Integration: Overview
- Updating Sales Order Data
- Creating and Updating Installed Assets in Siebel CRM
- Updating Sales Order Status
- Real-Time Order Status Updates
- Order Status Transition Flow
- Business Flow Implementation: Overview
- Business Flow Resources Used: Siebel CRM Services
- Industry Oracle AIA Components
- Services Provided
- UpdateSalesOrderOSMCFSCommsJMSConsumer
- UpdateSalesOrderSiebelCommsProvABCSImpl
- “Update Sales Order” Business Flow: Sequence
- Summary
- Quiz
- Practice 12: Promotion Downgrade

Order Fallout Management

- Objectives
- Order Fallout Management: Overview
- Order Processing Error Types
- Order Fallout Detection Subprocess
- Enriching the Order Fallout Fault Message
- Enriched Fault Message
- Order Fallout Detection Subprocess Flow
- Initiating the Appropriate “Create Trouble Ticket” Business Flow
- Order Fallout Notification Subprocess Flow
- Order Correction
- Order Correction Based on Fault Type
- Order Fallout Management Process Integration: Business Flows
- Create and Manage Trouble Ticket from OSM: Overview
- Functional Flow
- Assumptions and Constraints
- Create and Manage Trouble Ticket from OSM Implementation
- CreateFaultNotificationLFCommsJMSConsumer
- Integration Flows
- Order Failure Notification to OSM Integration Flow
- AIAOrderFalloutJMSBridgeService
- CreateOrderFalloutNotificationOSMCFSCommsJMSConsumer
- CreateOrderFalloutNotificationOSMCFSCommsProvImpl
- CreateOrderFalloutNotificationOSMCFSCommsJMSProducer

- Order Failure Notification to OSM: Sequence
- Create Trouble Ticket in Siebel CRM from OSM Integration Flow
- CreateTroubleTicketOSMCFSCommsJMSConsumer
- CreateTroubleTicketSiebelCommsProvABCSImpl
- CreateTroubleTicketRespOSMCFSCommsJMS Producer
- Create Trouble Ticket in Siebel CRM from OSM: Sequence
- Update Trouble Ticket in Siebel CRM from OSM: Industry Oracle AIA
- Components
- Update Trouble Ticket in Siebel CRM from OSM: Siebel CRM Services
- Update Trouble Ticket in Siebel CRM from OSM: Integration Flow
- UpdateTroubleTicketOSMCFSCommsJMS Consumer
- UpdateTroubleTicketSiebelCommsProvABCSImpl
- Update Trouble Ticket in Siebel CRM from OSM: Sequence
- Summary
- Quiz
- Practice 13: Order Fallout Management

Order Lifecycle Management (OLM) and Order Fallout Management (OFM) Technologies

- Objectives
- Exception Handling: Overview
- Exception Handling: Implementation
- Roles
- Error Messages for OLM
- Handling Error Notifications Through OFM
- Using Error Types to Control Responses to Order Fallout
- Extending Error Codes
- Handling Business Errors
- Transaction Management
- Extensions to Participating Applications
- Queues
- Queues List
- Oracle Mediator Resequencer
- Session Pool Manager (SPM)
- Summary
- Quiz

Course Summary

- Course Summary
- “Order to Cash” Pre-Built Integration
- Order Lifecycle Management
- Order Fallout Management
- Course Assessment