



Leveraging Oracle Quoting For A Fully Integrated Opportunity To Back Office Process

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- **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

Introduction

- **Atheros Communications**

- Founded in 1998 by leading experts in radio and signal processing from Stanford University, the University of California at Berkeley, and private industry
- Corporate Headquarters located in Santa Clara, CA
- 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 used by a broad base of leading customers, including personal computer, networking equipment and consumer device manufacturers.

Agenda

- Introductions
- Project Objective and Scope
- Business Drivers and Project Benefits
- Original State Diagram
- CRM to EBS Process Diagram
- Application Details
 - Key Decisions/Design
 - Application Screen Shots
 - Challenges
- Current State Diagram
- Lessons Learned
- Update – One Year Later
- Questions?

Project Objective

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

Project Scope

- Implement Oracle EBS Quoting (HTML) and Trade Management (Channel Management) applications
- Perform additional application configurations
 - CRM On Demand
 - CRM Administration (in EBS)
 - Order Management
 - Advanced Pricing (price lists only)
 - Inventory
 - Receivables
 - Payables
- Install and configure AIA integration between CRM On Demand and Quoting
- Use standard out of box functionality where possible

Project Scope

- **Enhanced:**
 - Printed Quote document
 - Workflow notifications for approvals

- **Create views in Discoverer business areas for Trade Management and Quoting**

- **Build custom interfaces**
 - Quoting to Pricing
 - Quoting to Trade Management

- **Conversions**
 - Over 200 quotes
 - Unclaimed accruals

- **Go-live by Jan. 1, 2009, 5 month project!**

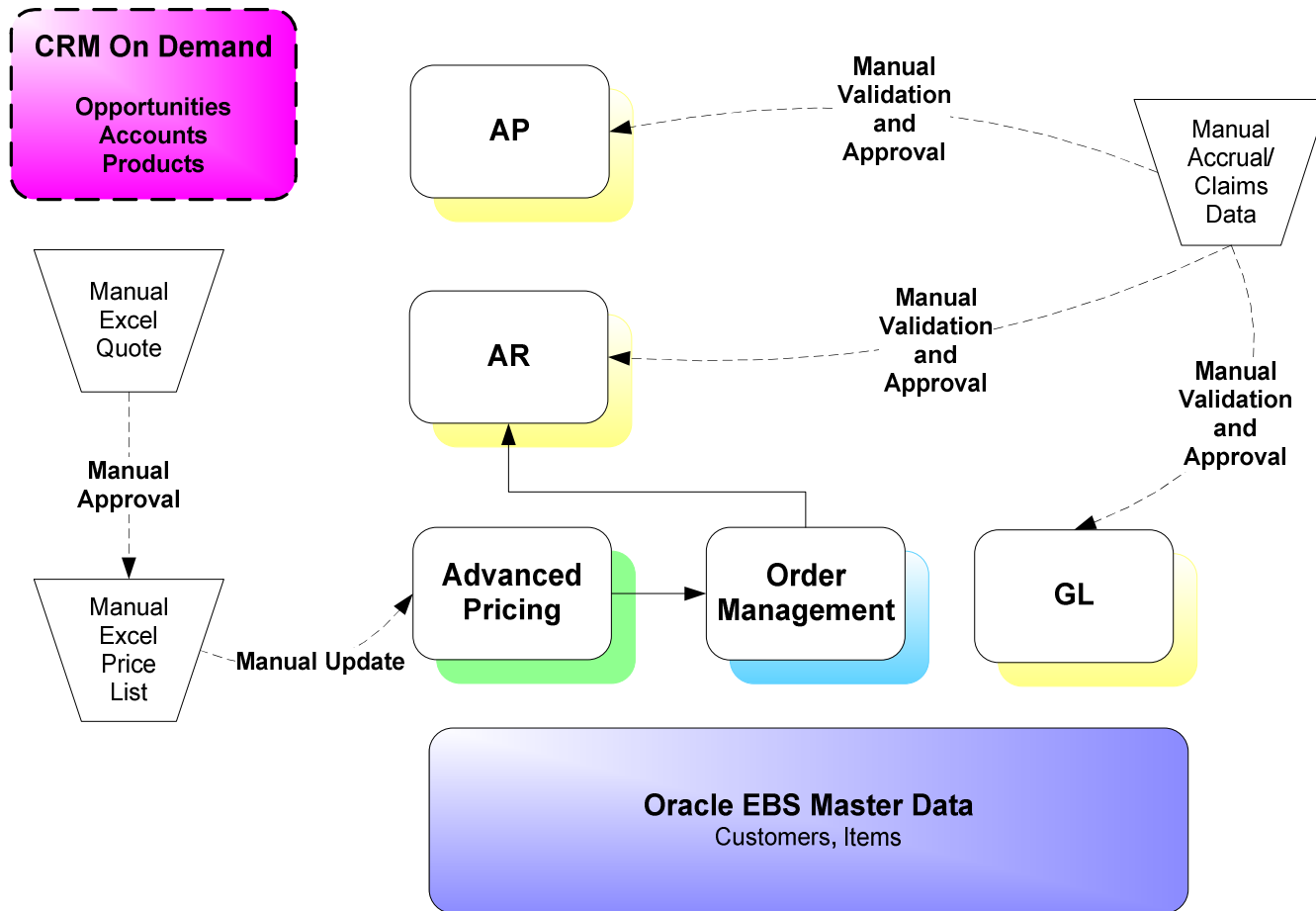
Business Drivers

- 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 CRM On Demand as Sales Portal

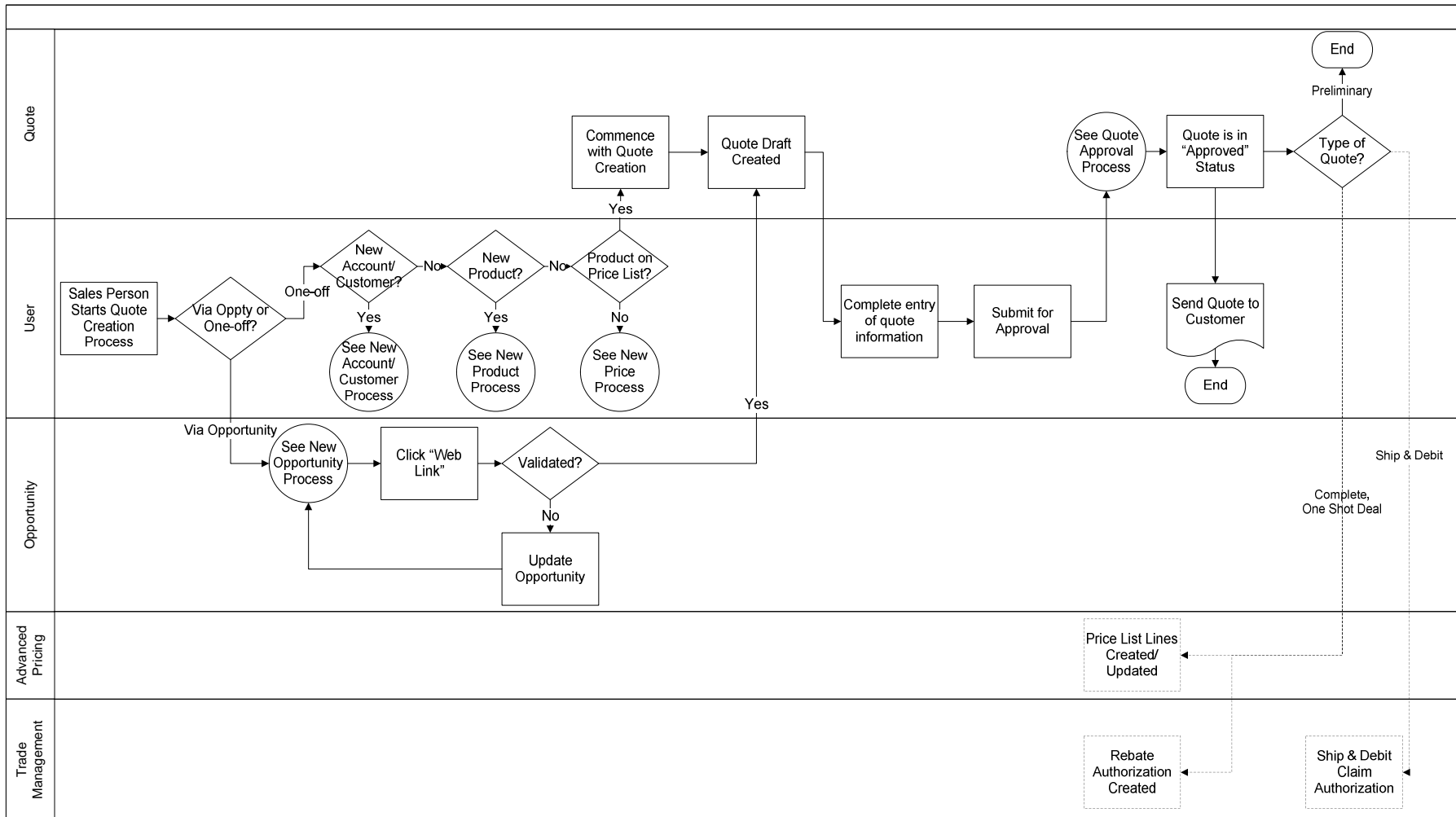
Project Benefits

- 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

Original State



CRM to EBS Process Flow



CRM On Demand

- **Key Decisions/Design**

- Created web links in CRM for quote creation and visibility of customer/opportunity quotes
- Use AIA to synchronize master data
- Limited synchronization of customer-related data
- Opportunity form was modified to capture Atheros-specific information

CRM On Demand

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

Welcome, TEST!
 Last Sign In Date - 1/16/2009 12:15:06 PM

[Edit Layout](#) | [Help](#) | [Printer Friendly](#)

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

Display by:

Sales Stage
 Above the Funnel
 In the Funnel
 Short List
 Selected
 Closed/Won
 Closed/Lost

Potential Project Revenue (000)

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 On Demand

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

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:

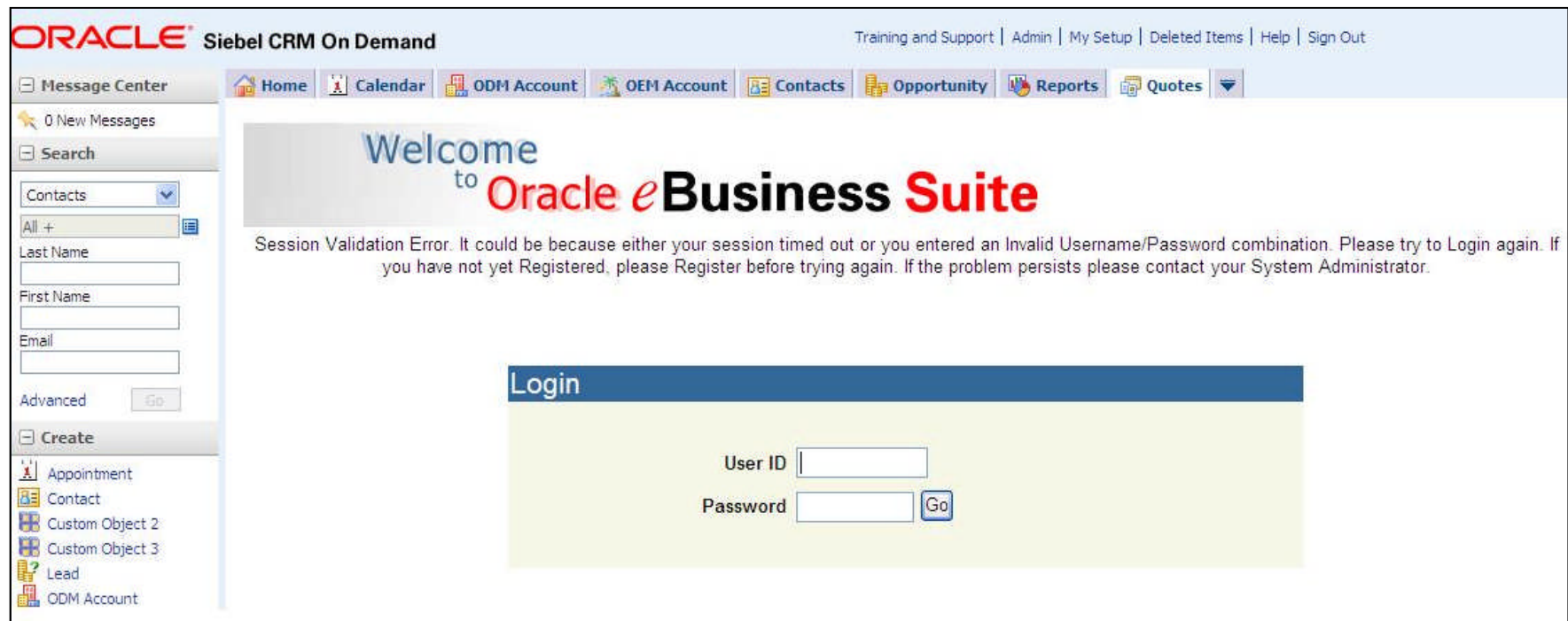
Objective	Modified By	Admin	1/15/2009 03:22 PM
Tactics	Owner	Admin	
Strategy	View Quotes	View Quotes for the Opportunity	
	Create Quote	Create Quote in EBS System	

Chipset Revenues Add Update Opportunity Totals

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

Show Full List

CRM On Demand



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

Message Center | Home | Calendar | ODM Account | OEM Account | Contacts | Opportunity | Reports | Quotes

0 New Messages

Search

Contacts

All +

Last Name

First Name

Email

Advanced

Create

- Appointment
- Contact
- Custom Object 2
- Custom Object 3
- Lead
- ODM Account

Welcome to Oracle eBusiness Suite

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.

Login

User ID

Password

CRM On Demand

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

Confirmation
A new quote has been created.

Quote List
Quotes for Opportunity: null

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

Previous 1 - 1 Of 1 Next

- **Challenges**

- CRM On Demand vs. On Premise
- AIA - application integration between CRM and EBS
- Test environments for CRM On Demand limited
- CRM is not org-specific, EBS is
- Synchronization of master data with CRM
- No single sign-on available between CRM and EBS
- Web links to Quoting are specific to a responsibility

Quoting

- Key Decisions/Design
 - Quoting set up in one org only
 - Created descriptive flexfields at both header and line
 - Used for:
 - Interface processing to Pricing & Trade Management
 - Approvals
 - Reporting
 - Multiple customer relationships captured on single quote
 - Salesperson enters the Model (Chipset) and configures the BOM (Chips)

Quoting

ORACLE QUOTING [Home](#) [Profile](#) [Sign Out](#) [Help](#)

Quotes

Quotes

Create Quote

* Indicates required field

General Information

* Quote Name	<input type="text" value="Q1 Quote"/>	Account #	<input type="text" value="6232"/>
* ODM Name	<input type="text" value="OAC SERVICES, INC."/>	* Expiration Date	<input type="text" value="07-10-2010"/>
Address	<input type="text" value="2105 South Bascom Avenue, Campbell, CA, 95008, United States"/>	Status	Draft
* ODM Salesperson	<input type="text" value="Harrison, Ivan"/>	* ODM Sales Group	<input type="text" value="Strategic Accounts - US"/>
Currency	<input type="text" value="US Dollar"/>	Source Name	<input type="text"/>
* Quote Type	<input type="text" value="STANDARD"/>	Price List	<input type="text" value="OACS"/>
* BU-Market Channel	<input type="text"/>	Attention	<input type="text"/>
SPR Number	<input type="text"/>	* Backlog Impact	<input type="text" value="NEW_ONLY"/>
Pricing Interface Status	<input type="text"/>	* Quote From Company	<input type="text" value="Atheros Technology, Ltd."/>
		* OEM Salesperson	<input type="text" value="Harrison, Ivan"/>

Quoting



Overview

Actions Duplicate Quote Go

General Information

Quote Name	Q1 Quote	Quote Number	7715 Version 1 Of 1
ODM Name	OAC SERVICES, INC.	Account #	6232
Address	2105 South Bascom Avenue, Campbell, CA, 95008, United States	Expiration Date	07-10-2010
		Status	Draft
ODM Salesperson	Harrison, Ivan	ODM Sales Group	Strategic Accounts - US
	Unassigned	Source Name	US
Currency	US Dollar	Price List	OACS
	<input checked="" type="checkbox"/> Complete		<input checked="" type="checkbox"/> 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	LF-AR3031	<input checked="" type="checkbox"/> LF-AR3031 : \$16.00	Each	1	\$8.00	Details
1.1	3031-AL1A	<input checked="" type="checkbox"/> BLUETOOTH - HCI ROM (HEADSET) LEADFREE	Each	1	\$8.00	Details

Quoting

- **Challenges**
 - Salespersons not setup properly in EBS
 - Managing Items at different levels
 - Managing the complexity of dual customer relationships
 - User adoption of new processes

Approvals

- **Key Decisions/Design**
 - Multi-tiered approval routing based on price, margin and volume minimums
 - Sales organization hierarchy determines routing to appropriate Area Manager
 - Market Segment DFF on quote determines routing to appropriate Marketing Director
 - Marketing organization hierarchy will determine routing to appropriate VP of Marketing and Marketing VP/GM
 - Price DFF on quote line used to initiate approvals
 - DFF on corporate price list to indicate allowed minimum selling price for Sales Manager and Area Manager

- **Challenges**
 - Transition from off-line, single person approvals to complex and cross-functional approvals

Email Notifications

- **Key Decisions/Design**
 - Email notifications sent for approval requests and approval results
 - FYI-only notifications sent to sales team assigned to quote when initially submitted for approval and upon final approval
 - Blackberry & iPhone supported
- **Challenges**
 - Standard notifications don't provide enough information for approver
 - Notifications hard to read on mobile device if there's a lot of data

Quoting Integration to Pricing

- Used to have “Price Matrix” spreadsheet that was thousands of lines long
 - Used to capture and validate pricing
 - Also captured rebate information
- Quotes types used to determine whether or not price interface initiated
- Using custom price attributes to capture Chipset, OEM Name & Quote Number
- Price start and end dates captured in DFF at quote line level
- If corporate price list used on quote, new customer-specific price list created during interface
- Complex logic used to both update existing and create new price lines
- Logic used to add components (chips) of chipset as well as substitute items (revisions)

Quoting Integration to Pricing

Advanced Pricing - Price Lists

Main Other

Name **OACS** Mobile Download Active

Description

Currency **USD** Round To **-2**

Effective Dates **01/11/2010** - Payment Terms

Freight Terms Freight Carriers

Comments []

List Lines Secondary Price List Qualifiers

Sarpreet's Pricing Folder

Product Context	Product Attribute	Product Value	Product Description	Value	Start Date	End Date	[]
Item	Item Number	LF-AR3031	LF-AR3031	0	01/01/2010	03/31/2010	7715.10000.
Item	Item Number	3031.AL1A	BLUETOOTH - HCI ROM (8	01/01/2010	03/31/2010	7715.10000.
Item	Item Number	3031.AL1E	BLUETOOTH - HCI ROM (8	01/01/2010	03/31/2010	7715.10000.
Item	Item Number	3031-BL1E	BLUETOOTH - HS ROM (f	8	01/01/2010	03/31/2010	7715.10000.

Price Breaks Pricing Attributes

Quoting Integration with Trade Management

- Public API for Offers used, but no API available for SPR (Special Price Request)
- Rebate and Ship & Debit (SPR) quote types create offers/SPRs in Trade Management upon approval
- Rebate and S&D start dates correspond to the start date DFF on the associated approved quote
- Capturing both OEM and ODM rebates
- Complex logic used to both update existing and create new offers
- Also using logic to add chips of chipset and substitute items for SPR/offer
- Using logic to derive the org for offer creation
- Upon creation in TM, SPR Number returned to quote

Quoting Integration with Trade Management



Offer Details - Accrual

Delayed discount not discounted on the face of the invoice.

*Offer Name : ODM / OAC SERVICES, INC. / ABC / LF-AR3031 / Q1-2010

*Offer Type : Accrual

Offer Code : 7715-1-Q1-2010-ODM-01

Start Date (example: 12/15/2000)

Currency : US Dollar

Activity

Marketing Activity (E.g. Listing Allowance, Shelf Space)

Committed Amount

Committed = Maximum Yes No

Owner

Description

*Status

Request Only

End Date (example: 12/15/2000)

*Discount Level : Line

Reusable

Confidential

Quoting Integration with Trade Management



Sales Orders (716761) - OAC SERVICES, INC.

Order Information | Line Items

Order Total: 400.00

Main | Pricing | Shipping | Addresses | Returns | Services | Others

Line	Ordered Item	Qty	Pricing Context	Unit Selling Price	Extended Price	Price List
1.1	3031-BL1E	50	ATHEROS PRICIN	8.00	400.00	OACS

Line Total: []
Description: BL

Actions

- + Items
- + Bills
- Pricing
- Price Li
- Price
- Copy
- Adjus
- Add I
- GSA I
- Multi

Adjustments - 505 REVENUE, 716761

Line 1 Item 3031-BL1E Description BLUETOOTH - HS ROM (HEADSET) LEADFREE S
Qty 50 UOM EA List Price 8.00 Selling Price 8.00

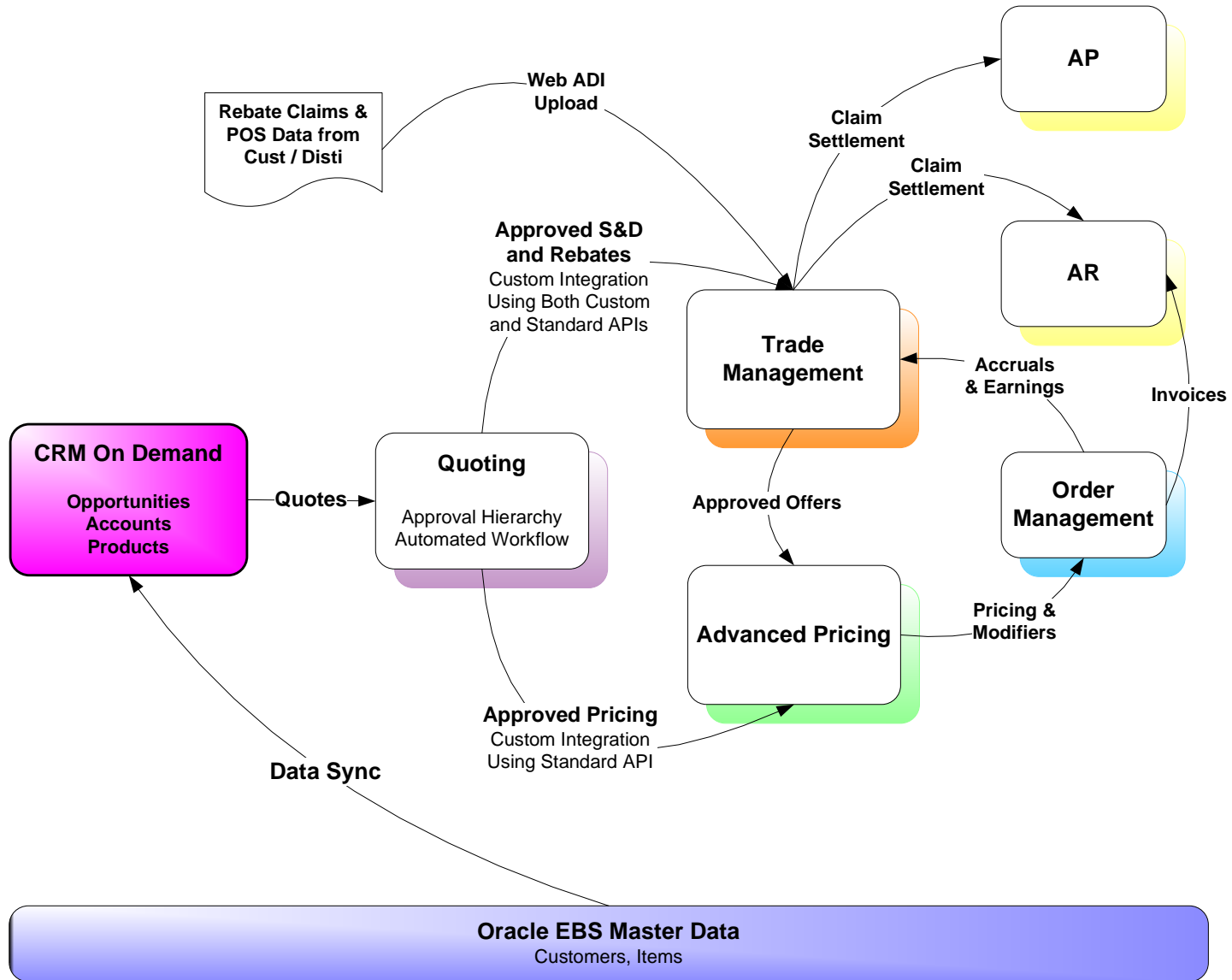
Adjustments Reason Accruals

Level	Modifier Number	Name	Type	List Line	Rate	Amount Reduced
Line	7715-1-Q1-2010-ODM	ODM / OAC SERVIC	Discount	1098026		1.00
Line	7715-1-Q1-2010-OEM	OEM / OAC SERVIC	Discount	1098029		1.00

Description [] Effective Date 01/01/2010 - 03/31/2010

Cancel Attributes Related Details Apply

Current State



Lessons Learned

- Expertise required for exporting, mapping and loading data
- If CRM exists prior to integration, requires additional time to reconfigure
- Quote data validation required prior to TM & Pricing interface
- Approval routing after timeout
- Allow more time for data conversion

Update – One Year Later

- **Challenges**

- Complex approvals slow up the process
- Transitioning manual business processes to system-based process that enforces rules

- **Benefits**

- Better, real-time reporting and analysis
- Standardized quote process
- No manual management of spreadsheets for pricing and POS data
- Pricing is always 100% validated within Oracle

Questions?

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