

CASE STUDY

Integrating ServiceMax and Oracle E-Business Suite



OVERVIEW

The customer provides graphic and precision solutions and is headquartered in Japan with its North America office located in Chicago, IL. The customer uses Oracle E-Business Suite (R12) as its back-office business system and had recently implemented ServiceMax to better manage their after-sales operations. They sought to integrate ServiceMax with Oracle EBS to eliminate the possibility of duplicate information being entered into the system, as well as to enable seamless exchange of data between both systems.

Key Requirements

- Build interfaces between Oracle Applications and Service Max so the order information is automatically sent and received to process the order in Oracle Order Management, and keep the work order information in sync in both systems.
- Handle errors, exceptions, and any reconciliation requirements.

Solution Approach

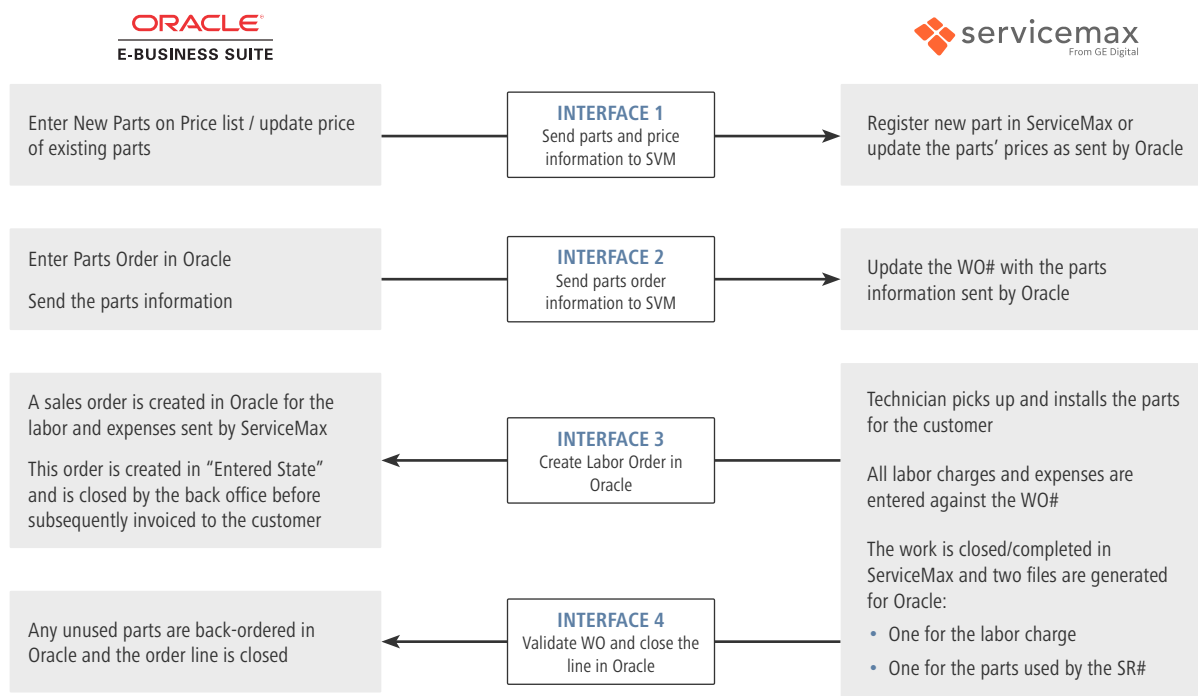
We designed and developed interfaces to connect Oracle EBS to ServiceMax and automate the following processes:

- To raise and track service requests in ServiceMax and integrate the requests with Oracle EBS
- Maintain the prices of the parts in sync in both systems.
- Sending work order information to ServiceMax.
- Creating labor orders in Oracle Order Management before subsequently processing them for invoicing.
- Validate the order, return the used parts to inventory, and take the line to closure in Oracle EBS.

Our solution addressed the following key business process functionalities:

- A work order is entered in ServiceMax and a sales order is entered in Oracle EBS whenever there is request from a customer for parts installation.
- Sales order entered in Oracle EBS will have the quantity of the order that is placed and picked by the Engineer.
- An interface sends the information to ServiceMax and the work order number in ServiceMax is updated with the parts that are picked for installation.
- After the installation is done at customer site, labor and expense charges are entered in ServiceMax for the respective work order.
- Information is brought to Oracle EBS to create a sales order for the invoices and labor charges.
- Engineer enters the parts used during installation to the work order and completes the work order.
- This information is also brought to Oracle EBS to do a back order for any unused parts, and to close the order line.
- To sync up the prices of the parts in Oracle EBS and ServiceMax there is an interface which runs daily, and sends any parts that have underwent a price change or were recently added (new parts).

Figure 1. ServiceMax to Oracle E-Business Suite Integration Process



Integration Process

We designed and built four interfaces to provide the following required functionalities:

- **Interface 1** – Outbound from Oracle EBS (to extract the parts and pricing information to be sent to ServiceMax). Data will be extracted from Oracle EBS into a .CSV file, which will be sent to an inbound ServiceMax server via FTP.
- **Interface 2** - Outbound from Oracle EBS. Whenever a service request is raised for installation of parts, a sales order is created in Oracle EBS. This order will have customer information, work order number, parts (items number), quantity, price, engineer bin location, shipped quantity, picked quantity, etc. All of this information is extracted and sent to ServiceMax via .CSV file.

- **Interface 3** - Inbound to Oracle EBS. An Order for Labor charge will be entered in ServiceMax and sent to Oracle EBS for a sales order creation. After, a sales order for the labor/service charges will be created in Oracle EBS and invoice-ready.
- **Interface 4** - The engineer will enter the parts used and all detailed information when the work order number is closed in ServiceMax. This information will be pushed to Oracle EBS, similar to the work order number, parts consumed, closing comments, work order closed date, etc.

Business Benefits

- Reduced manual intervention by automating the flow of data between both systems.
- Reduced operational costs (OPEX) through automation.
- Streamlined the process of raising and tracking Service Requests and accessing them in Oracle EBS.
- Enabled drastic business growth and yielded a faster transfer of data across the system.

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