

WHITE PAPER

Integrating Salesforce CRM and Oracle E-Business Suite using MuleSoft

PROJECT OVERVIEW

A sales person is effective only to the extent of the knowledge he has about the product or service that he is selling. Even the most "blue chip" CRM systems ineffectively provide the internal product or services information required by the sales person. Typically, the information related to customer, sales order, availability, etc. resides within the internal ERP systems, which limits access to the increasingly mobile salesforce. Being able to access information on-the-go in real-time expedites the sales process and enables the sales person to make more effective sales.

Solution Approach

To bridge the information gap, we integrated SFDC to Oracle E-Business Suite using MuleSoft's integration tool. We built a framework to enable the sales person to optimize sales through the Cloud CRM (SFDC), and access required information from his or her central repository (ERP system). This CRM (SFDC) can be operated from anywhere using any device. Oracle E-Business Suite is the back-end system for business transactions. Using Mule Soft as the integration engine, we proposed a solution that creates customer details (customer and site details) and sales order in Oracle E-Business Suite based on the opportunity created in the CRM (SFDC). It also sends an acknowledgement back to SFDC by updating the sales order number against the designated opportunity.

CUSTOMER SNAP SHOT

- Leading manufacturer of physical infrastructure for Data Center, Enterprise, and Industrial environments
- Operations throughout 112 countries
- Location: Chicago, Illinois
- 5,000 employees
- \$1+ billion (USD) annual revenue

PROJECT TOPOLOGY

- MuleSoft AnyPoint Studio 3.8
- Oracle E-Business Suite R12.x
- Salesforce - Summer '17



Solution Process

1. MuleSoft integrations assists in updating an item from EBS to SFDC as a product, which a salesperson can see and plan to sell.
2. The sales person selects a product in SFDC. This event triggers an action in EBS to bring the availability information back to SFDC.
3. The sales person can proceed to create an opportunity based on availability. The system will allow creation of an opportunity if the available quantity is equal or more than the requested quantity. Alternatively, if there isn't any availability or less availability, SFDC will throw up a warning but allow creation of an opportunity.
4. Based on the opportunity details, MuleSoft will check if the customer pre-exists in EBS for the associated account in SFDC. If the customer does not exist in EBS, MuleSoft creates the customer details and the associated Bill-To and Ship-To details (sites) by calling standard API's. Subsequently, MuleSoft creates sales order in Oracle EBS for the customer.
5. Later, MuleSoft sends back to SFDC the information regarding generated sales order for the particular opportunity.
6. MuleSoft throws up an exception if it cannot connect to either SFDC or EBS after a set number of tries.

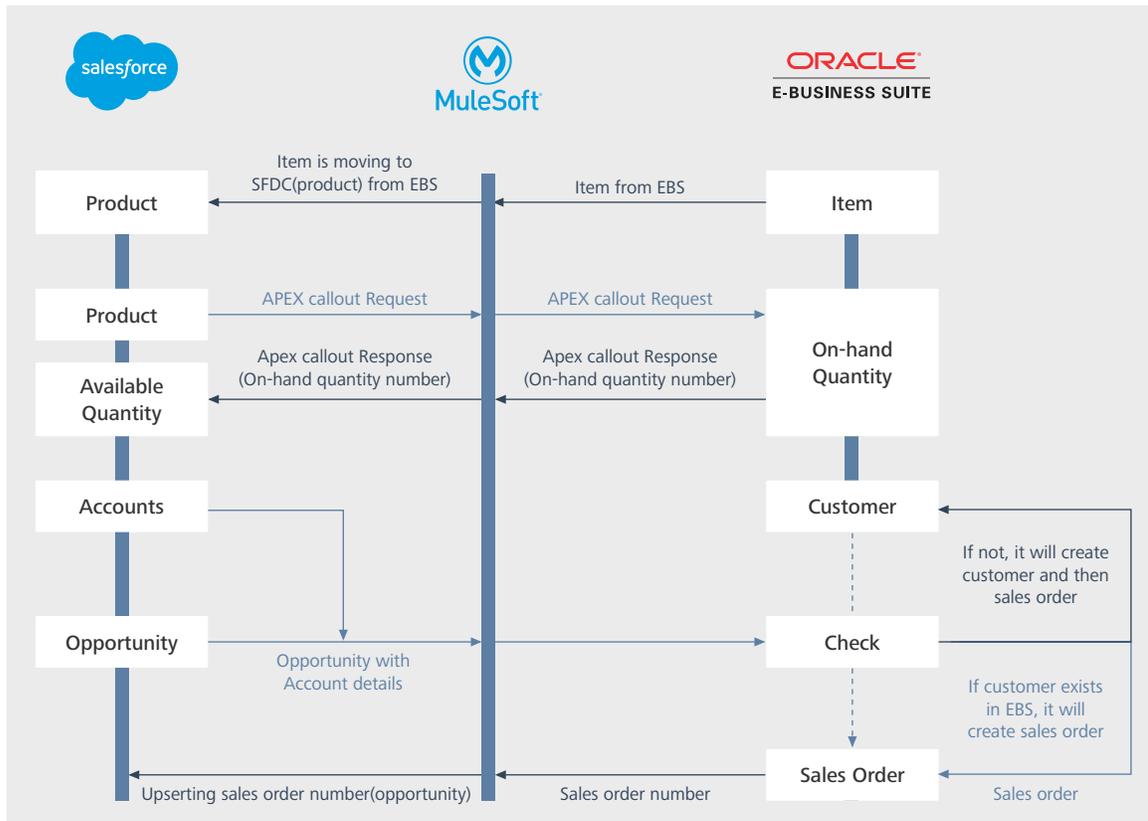


Figure 1. SFDC and Oracle EBS integration process using MuleSoft. This solution is deployed exclusively on cloud.

Business Benefits

- Sales teams can close deals faster by having instant access to product information through the CRM system.
- Decreased the amount of time spent manually entering information into the system by creating a single source of truth between Salesforce and Oracle E-Business Suite.
- Automating the customer and sales order creation process in Oracle E-Business Suite enabled sales teams to spend more time selling.

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