



PERFECTING CUSTOMER RELATIONSHIP MANAGEMENT

# CONNECTING SALESFORCE EXPERIENCE CLOUD & ORACLE EBS

---

# PROBLEM STATEMENT



## High-Level Challenge

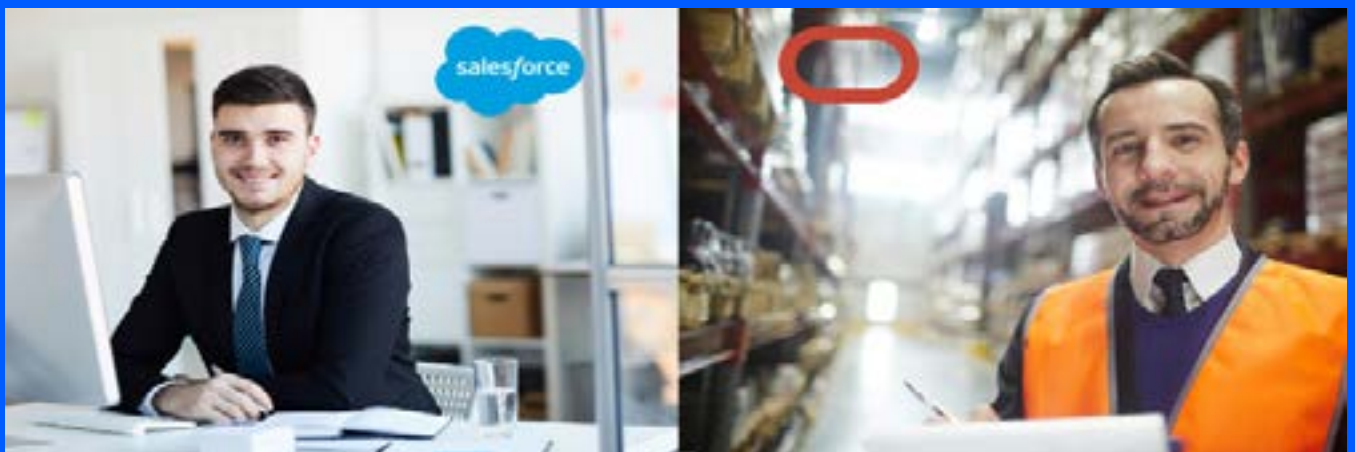
Customer data is crucial to every part of a business, from fulfillment and billing to account retention and growth.

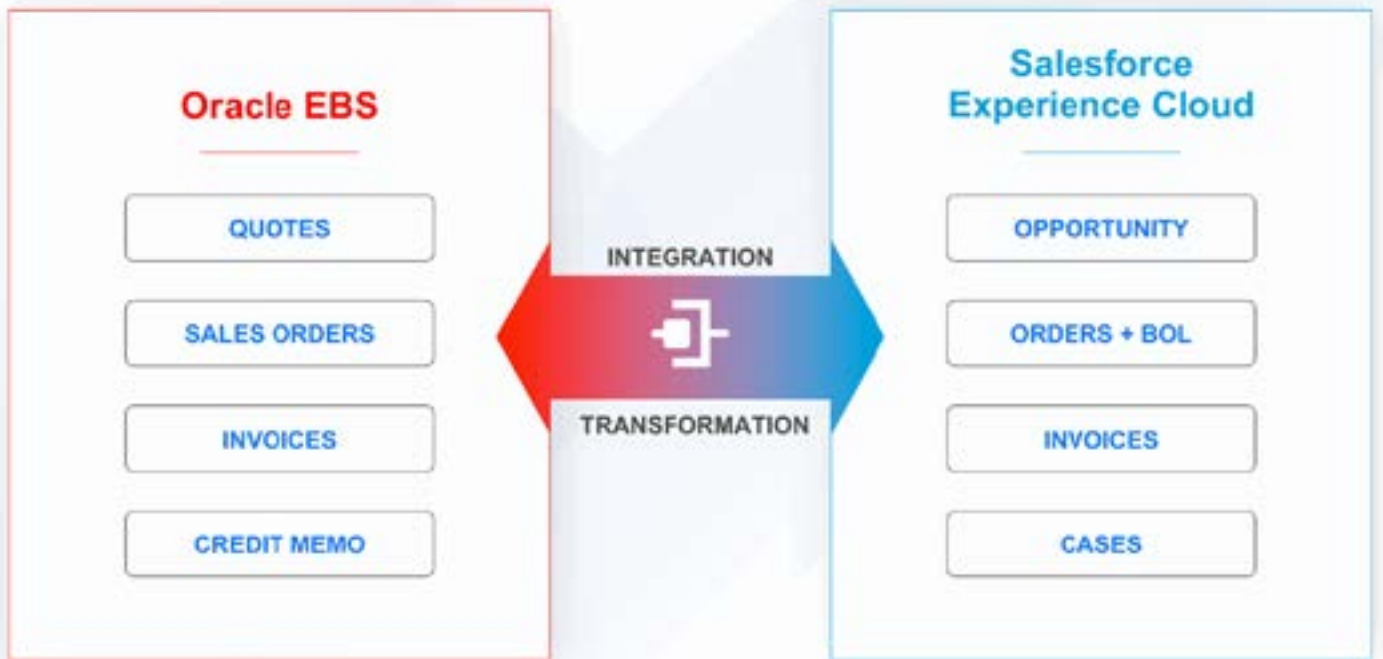
For many businesses, some of that data resides in **Oracle EBS**, sitting on-premises and protected by a corporate firewall, while other equally relevant data points are stored in **Salesforce CRM**. Without strong plumbing between the two systems, it's impossible to create a real-time comprehensive data view for customers or employees.

When customers don't have access to their data, they get frustrated. When your account managers don't have a full-picture, 360 customer view, they can't maximize the two-way value of their accounts.

## The Solution

By connecting Oracle EBS to Salesforce CRM and leveraging Salesforce Experience Cloud, businesses can create a mobile portal experience that creates a real-time, 360-degree customer view. Those same back-office integrations also create a single, complete narrative source of truth for sales, marketing, operational, and customer care professionals, increasing productivity and business potential.





*Transformation rule creation is a key consideration when integrating Oracle & Salesforce environments because objects that represent similar concepts often have different names.*

## Bridging Oracle & Salesforce

Connecting an on-premises Oracle ERP & Salesforce CRM to create a single source of truth for your internal and customers is a five-step process:



### Establish the business objects mapping and transformation rules

The first step is to clarify down to the granular attribute-level what business information needs to be available to the customer, how to get that information, and what business rule/transformation needs to be applied before presenting it to the customer. This step helps identify whether standard Salesforce business objects are enough to hold all the information from EBS or if custom business objects or if fields would need to be created.

Here is a snippet of the fields mapping between Oracle Order object and Salesforce Order object, which is a standard Salesforce object but with both standard and custom fields.

ORD_DATE	OE_OROER_ HEADERS_ ALL. ORDERED_DATE		ORACLE START DATE	EffecticeDate
REQ_DATE	OE_OROER_ HEADERS_ ALL. REQUEST_DATE		ORACLE REQ DATE	Oracle_Req_Date_c
SALESPERSON	JTF_RS_ RESOURCE_EXTNS_ TL.RESOURCE_AME	Salesforce lookup in User object basis SALESPERSON, if not found then salesforce lookup in RepNameMapping object with SALESPERSON	ORDER OWNER	OwnerID
ORDER_TYPE	OE_TRANSACTION_ TYPES_TL.NAME		ORACLE ORDER TYPE	Order_Type_c
ORDER_TYPE	OE_TRANSACTION_ TYPES_TL.NAME		ORDER TYPE	Type
ORGANIZATION_NAME	HR_ALL_ ORGANIZATION_ UNITS.NAME		ORGANIZATION NAME	Organization_ name_c
SHIP_FROM_BRANCH	HR_ALL_ ORGANIZATION_ UNITS.NAME		SHIP_FROM_ BRANCH	SHIP_FROM_ BRANCH_c
CUSTOMER_JOB_NAME	OE_ORDROER_ HEADERS_ ALL. ATTRIBUTE4 or OE_ORDROER_ HEADERS_ ALL. ORDER_NUMBER (if ATTRIBUTE4 is NULL)		CUSTOMER JOB NAME	Customer_Job_ Name_c
HEADER_STATUS	OE_ORDER_ HEADERS_ ALL. FLOW_ ALL.FLOW_ STATUS_CODE		ORACLE HEADER STATUS	Oracle_Header_ Status_c
INSIDE_SALES_REP	OE_ORDER_ HEADERS_ ALL. ATTRIBUTES	Salesforce lookup in User object basis INSIDE_SALES_REP, if not found then Salesforce lookup in RepNameMapping object with INSIDE_ SALES_REP	INSIDE SALES REP	Inside_sales-Rep_c





## Open the secure connectivity

The next step is to create a tunnel through which information from on-premises Oracle EBS can flow to Salesforce cloud, and vice versa, in a secure yet responsive manner. This tunnel provides the required infrastructure to build the integration framework.



## Utilizing enriched connection adapters

Once the core connectivity is established, reusable connections are created (one each for Salesforce and Oracle EBS) in the integration platform using the connectivity adapters. These adapter-based connections serve as the base for all integrations and are also customized to handle edge-scenarios or improve performance wherever required.



4

## Building integrations as independent microservices

The next critical step is to identify and build core system integrations that can be reused many times across different business integrations. These core microservices are used as building blocks while orchestrating business integrations or process services, like creating “Opportunities” in Salesforce from “Quotes” in EBS, updating “Product Inventory” while creating “Orders” in Salesforce from “Sales Order” in EBS, transforming “Cases” from Salesforce to “Credit Memos” in EBS, etc.



5

## Delivering connected omnichannel customer experience via Salesforce experience cloud

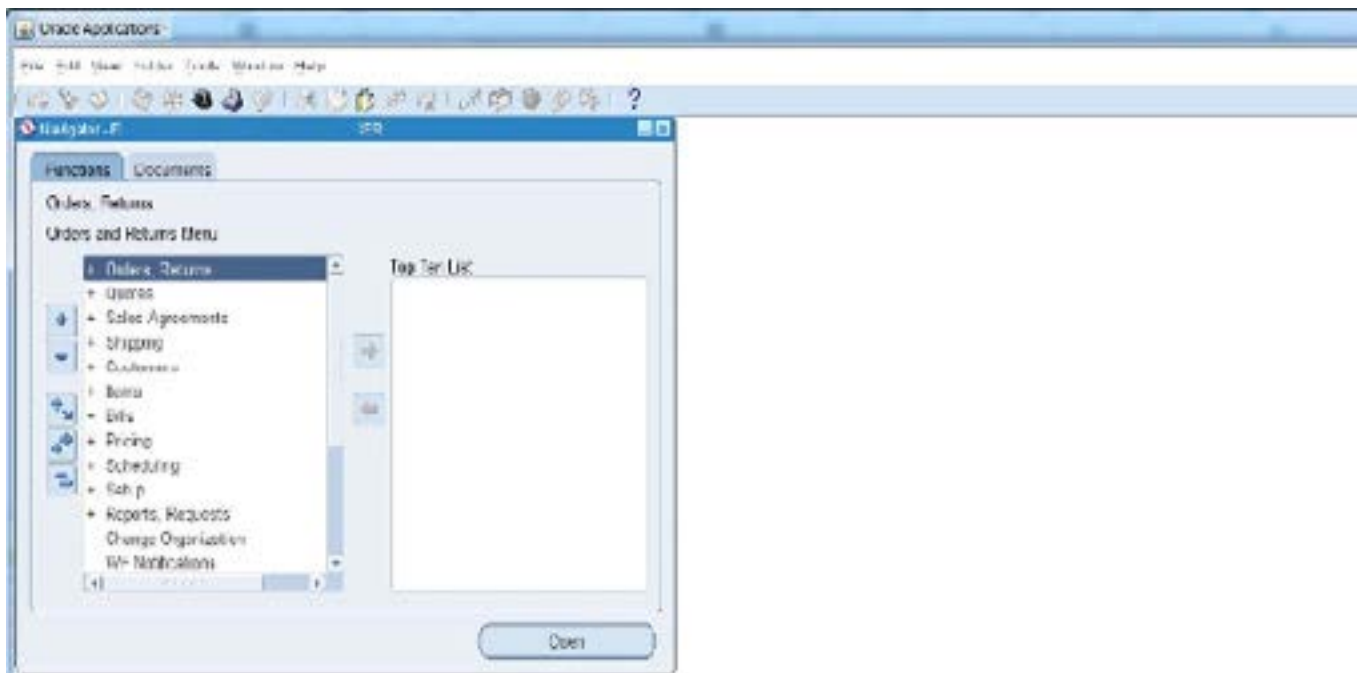
With those data bridges in place, you can build customer-facing and internal sales team portals using Salesforce Experience Cloud, keeping in mind the specific needs of end-customers and the sales team. This combines the simplicity and power of a great user experience with managing the business processes, approval flows, and other obligations that exist within the enterprise.

# A 360-Degree View

By connecting your Oracle ERP and Salesforce CRM, you can create a comprehensive data narrative for all customer accounts and interactions. Leveraging Salesforce Experience Cloud on top of that integration, you can build a 360-degree customer data view for internal use and customer access.

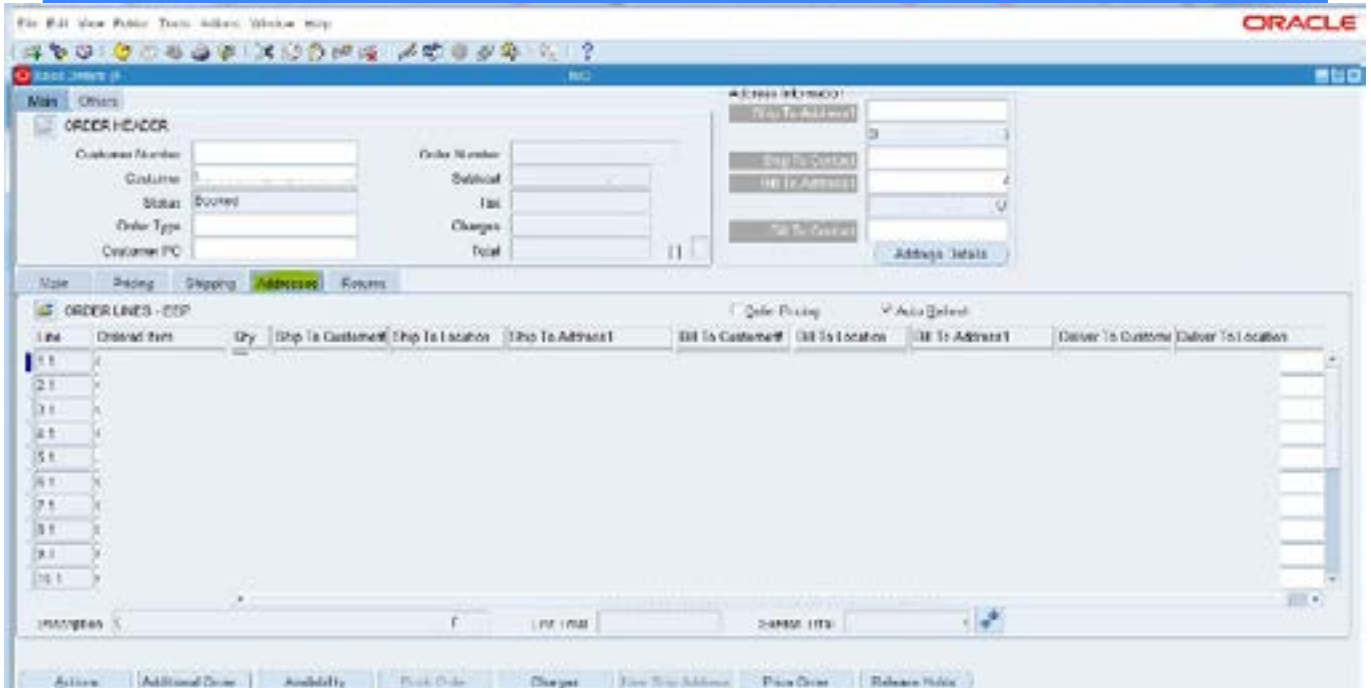
This solution is a win-win from an operational and a customer care standpoint. It creates internal efficiencies that enable a deeper level of account management and engagement while making interacting with your brand to extract data a pleasure for customers.

Furthermore, once you have an integration framework in place between your ERP and CRM, you can begin to embrace additional microservices-based automations, such as AI-based predictive ordering and next-gen customer nurturing based on machine learning insights.

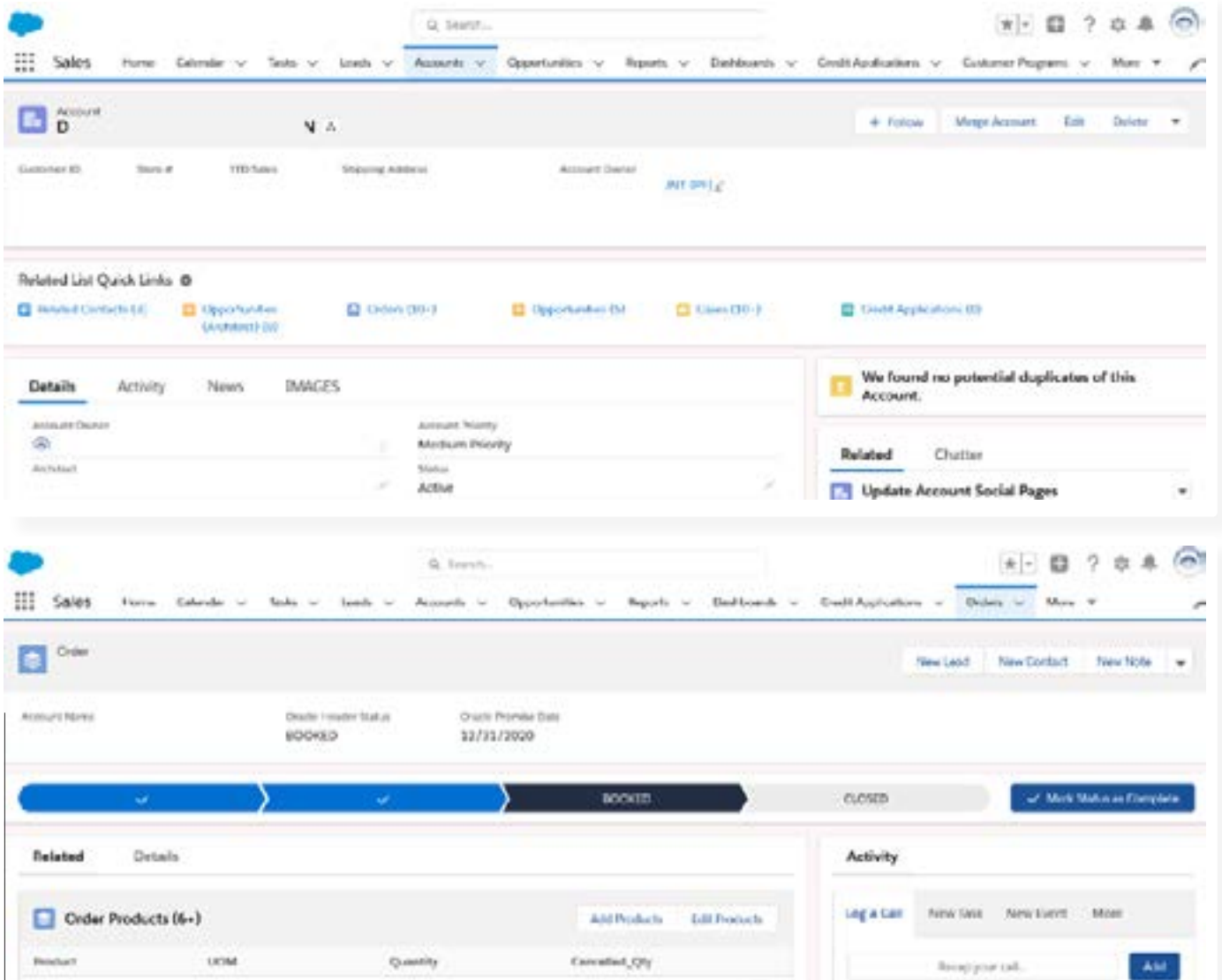


Office/Operational Professional View (Oracle-Based)

## Office/Operational Professional View (Oracle-Based)



## Office/Operational Professional View (Oracle-Based)







# Perfecting Customer Relationship Management: Connecting Salesforce & Oracle EBS

Whitepaper

by

