

WEBCOM, INC.

WebSource CPQ Validated Integration with Oracle CRM On Demand



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WebSource CPQ is a robust application that gives organizations using Oracle CRM On Demand the ability to quickly move from opportunity to order.

Company Overview

Webcom's WebSource CPQ helps drive increased revenues and margins, increased customer satisfaction, reduced costs, and improved productivity. The solution is ideal for companies with some level of complexity in terms of products, sales hierarchy, discounting rules, pricing rules, and channels, whether they are supplying complicated equipment, software, or service proposals.

WebSource CPQ not only handles the traditional bill of materials, routing, and diagram generation tasks frequently associated with product configurators but also addresses the guided selling, proposal generation, and multilevel channel management tasks associated with sales configurators. In addition, the solution automates quoting, quote revisions, and the quote approval process, as well as guided selling and self-service applications.

Integration Overview

When integrated with Oracle CRM On Demand, WebSource CPQ provides customers with the ability to quickly move from opportunity to order. Requiring only a browser, WebSource CPQ, when used in conjunction with Oracle CRM On Demand, enables customers to configure, price, quote, and propose offerings across multiple sales and distribution channels, anytime, anywhere. WebSource CPQ complements and extends Oracle CRM On Demand, by taking opportunity to quote to order without any duplication of effort or data. The solution helps drive increased revenues and margins, increased customer satisfaction, reduced costs, and improved productivity.

Key Features

- Multiple quotes per opportunity
- Ability to handle simple quotes as well as complex configurations
- User-defined document and proposal processing
- Multiple currencies and languages
- Approval processing and revision tracking within WebSource CPQ
- Access from anywhere, anytime
- Real-time administration function
- On demand Web application



Through the Oracle PartnerNetwork Application Integration Architecture for Partners Initiative, partners with validated integrations are able to provide customers with standards-based product integrations, tested and validated by Oracle. Customers benefit from improved risk management and smoother upgrade capability, leading to a lower total cost of ownership and greater overall satisfaction.

Availability

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Integration Details

The integration of WebSource CPQ and Oracle CRM On Demand enables users to create quotations and proposals for their products or services and tie the quotes and proposals back to Oracle CRM On Demand opportunities. The integration is accomplished with a combination of Oracle CRM On Demand Web links and Web services.

The integration enables the creation and maintenance of quotations, including monetary value updates back to the opportunity in order to keep forecasting in sync.

The user selects a **Generate Quote** Web link from within the opportunity. Upon successful authentication, the user is directed to a landing page displaying all quotes for this opportunity. Based on the user's selection, either a new quote is created or an existing quote is retrieved. For new quotes, billing, shipping, and contact information is retrieved from the opportunity and the quote ID is passed back to the opportunity. The user is directed to configure a product and add it to the quote, or, if an existing quote is retrieved, the quote is displayed to the user for subsequent action. Any number of supporting documents can be generated from the quote within WebSource CPQ—in Microsoft Excel, Microsoft Word or Adobe PDF format—and then attached to the opportunity with a simple button click in WebSource CPQ. Additionally, these documents can be attached to an e-mail message for electronic delivery. The opportunity revenue field is updated to reflect the total amount of the quote and keep forecasting in sync.

Users can also start their session in CPQ, create quotes and customers there, and then push data to Oracle CRM On Demand. CPQ will create an opportunity and an opportunity account in the CRM system, based on the mappings defined in CPQ Setup.

The CPQ administrator can define different mappings between Oracle CRM On Demand and CPQ: product mappings, CPQ quote status/opportunity sales stage mappings, CPQ quote fields/opportunity field mappings, CPQ customer roles/account, and contact mappings.

Environment

Partner Environment

Webcom WebSource CPQ, Version 8.0

Oracle Environment

Oracle CRM On Demand 16

For additional information about partnering with Oracle, please contact opninfo_us@oracle.com or visit partners.oracle.com.

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