



Fixed Scope Offering for Implementation of Sales Cloud & Sales Cloud Integration With GTS Property Extensions

Today's Business Challenges



- ❖ Adopt leading CRM practices and stream line processes
- ❖ Take advantage of CRM to attract new customers, develop and retain existing customers
- ❖ Maximize sales force productivity
- ❖ Improve Sales Planning, Generate quality leads and improve revenue
- ❖ Have 360 degree view of the customer
- ❖ Faster deployment of CRM for quick ROI
- ❖ Minimize risk typical of long IT projects
- ❖ Getting quick wins and acceptance from users

FSO Proposal Objective



- ❖ GTS Fixed Scope Offering is designed for customers who want to deploy Oracle Fusion Applications quickly and efficiently.
- ❖ As against traditional projects with long analysis, development and testing phases, the objective of GTS Fixed Scope Offering is to get the Applications up and running on Oracle Cloud in as little as 8-10 weeks.
- ❖ With strong domain knowledge, application expertise and unique technical skills GTS brings to you the quick ROI at minimum risk for your Cloud initiatives.
- ❖ This document provides insight into the scope, approach and methodology used for this “Fixed Scope Offering”

Scope (CRM Modules)



Start-Up Packs

Standard:

- CRM Base
- Territory Management
- Lead Management
- Opportunity Management
- Forecast Management

Enterprise:

- As **Standard** + Quota Management and Sales Campaigns

- Activity Streams
- CRM Desktop
- CRM Smart Phone
- Sales Catalogue
- Transactional BI

Premium:

- As Enterprise + Sales Predictor, Opportunity Landscape, Incentive Compensation, and Enterprise Contracts

Scope-Configurations



Items Included	Descriptions	Threshold
Business Units and Legal Entity	Business Units	SetUp for 1 Business Unit
Oracle CRM Fusion Base	Teams, Hierarchies, Role Definition, Opportunity Management	Sales Teams- Up to 5 Sales Org Hierarchy – Up to 4 level Up to 2 Sales Methodology
Oracle CRM Fusion Desktop	MS Outlook Integration	Standard Out of the Box fields for Opportunity, Leads, Customers and Contacts
Oracle CRM Mobile	Integration with Handheld Devices	Android, iPhone and Blackberry Phones
Oracle Fusion Transactional BI	Reports to be derived for business purposes	Configuring Up to 15 Standard Reports using BI composer.

Scope-Configurations



Items Included	Descriptions	Threshold
Oracle Territory Management	Automatic Assignment of Customers, Leads and Opportunities to resources	Maximum of 3 dimensions with 10 attributes to be used for territory definition related to products and geography.
Oracle Fusion Sales Catalog	Definition of items for sales and hierarchies	Hierarchy of up to 4 level
Data Conversion	Converting Existing Data from Legacy into Oracle Fusion CRM	Customer- 50k Records Person- 50k Records Contacts – 100k Records Opportunity–10k Records
Workflow	Business Process Management to send emails/notifications based on events	3 Workflow Processes

Scope-Business Processes



Modules	Key Features
CRM Base	Sales Dashboard; Sales Forecasting; Activity Stream; Lead Management; Opportunity Management; Customer Centre; References and Competitors; Assignment Manager
CRM Desktop	Seamless Microsoft Outlook integration; Synchronization of Accounts, Contacts, Leads, Opportunities, Email, Calendar and Tasks
Smart Phone Edition	Contact and account management; Calendar and contact integration; Opportunity and lead management; Maps and phone; Real-time analytics; View CRM contacts geographically close

Scope-Business Processes



Modules	Key Features
Territory Management	Define territories using customer, channel and product attributes; Centralized or decentralized territory administration; Detect gaps and overlaps in territory coverage; Date effective sales territories and versioning
Sales Catalog	Create an n-tiered hierarchy of product groups; Define who can purchase a product or group of products; Select products and promotions with a graphical sales catalogue; Leverage keyword search, product comparison and narrow-by filters
Transactional BI	Configurable Real time Dash Boards and reports

Implementation Methodology



- ❖ GTS Uses OUM Cloud Approach for implementation
- ❖ This is based on the same principles as Oracle's Unified Method (OUM) to allow consistent approach across all SaaS products.
- ❖ This is specifically designed for implementing Oracle Cloud applications, according to well defined and tested activities and deliverables;
- ❖ Salient Features of this method includes:
 - ✓ An easy to follow framework of activities that allows efficient, step by step project implementation centered around few and essential activities and deliverables,
 - ✓ Short, well structured implementation cycles,
 - ✓ Iterative configuration,
 - ✓ Best practice suggestions for all business decisions avoiding customizations,

Implementation Methodology



- ❖ The implementation uses Fusion Applications Toolkit which has predefined, value-adding materials to reduce workload
- ❖ Planned for up to 4 four modules per release cycle
- ❖ Multiple releases are possible to accommodate incremental scope and/or timeline decisions

Implementation Approach



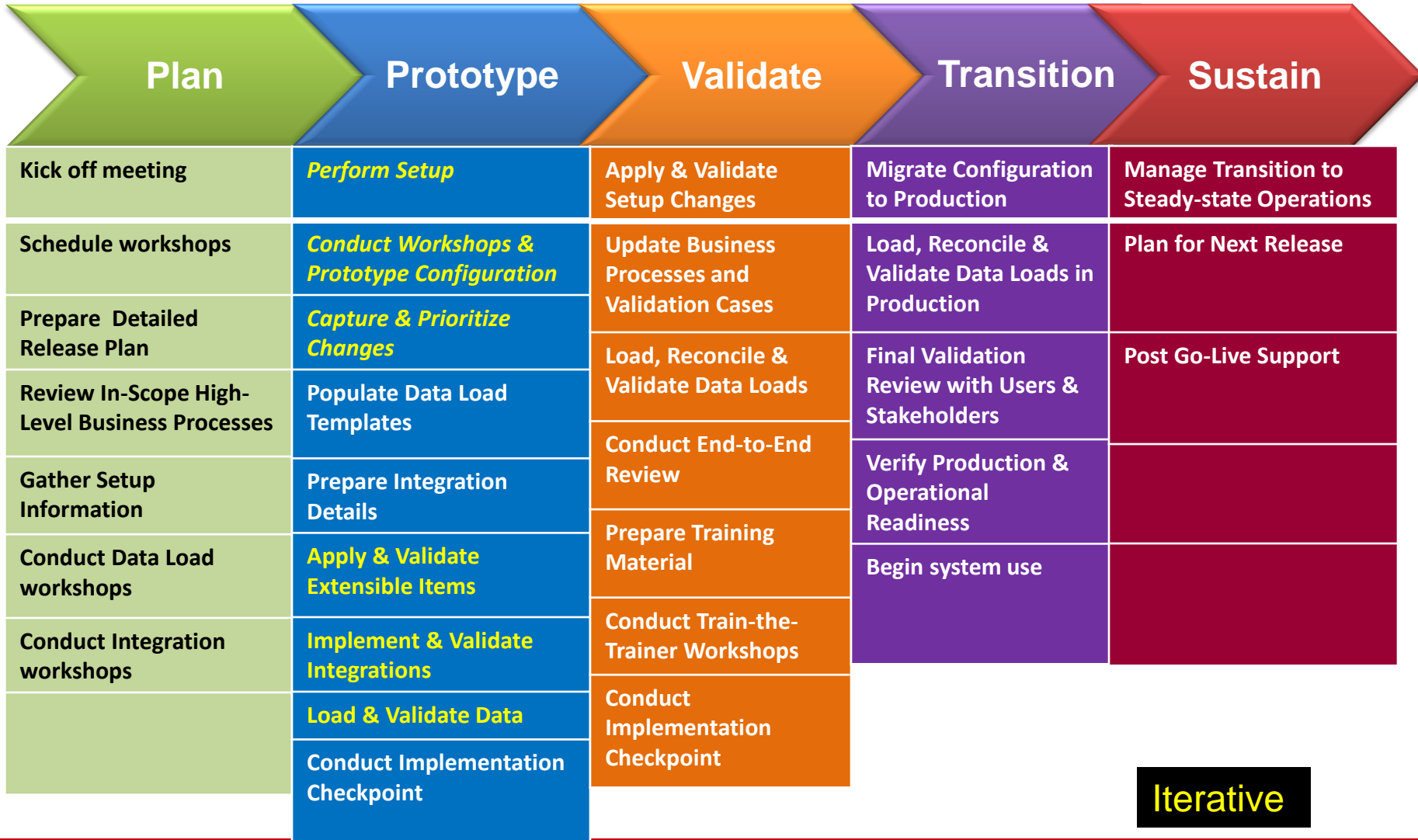
Key Features

- Configuration of pre approved scope
- Fully provisioned & working system in a Rapid time frame
- Processes are from Out of box – Best Practices
- Adopt and not Adapt
- FSO acts as Baseline for future releases
- Continuous engagements for configuring additional modules/ functionalities of future releases

Benefits

- Faster Deployment of Essential Functions
- Faster Time to Value
- Weeks and Not months
- Better Governance and Higher success rate

Implementation Approach



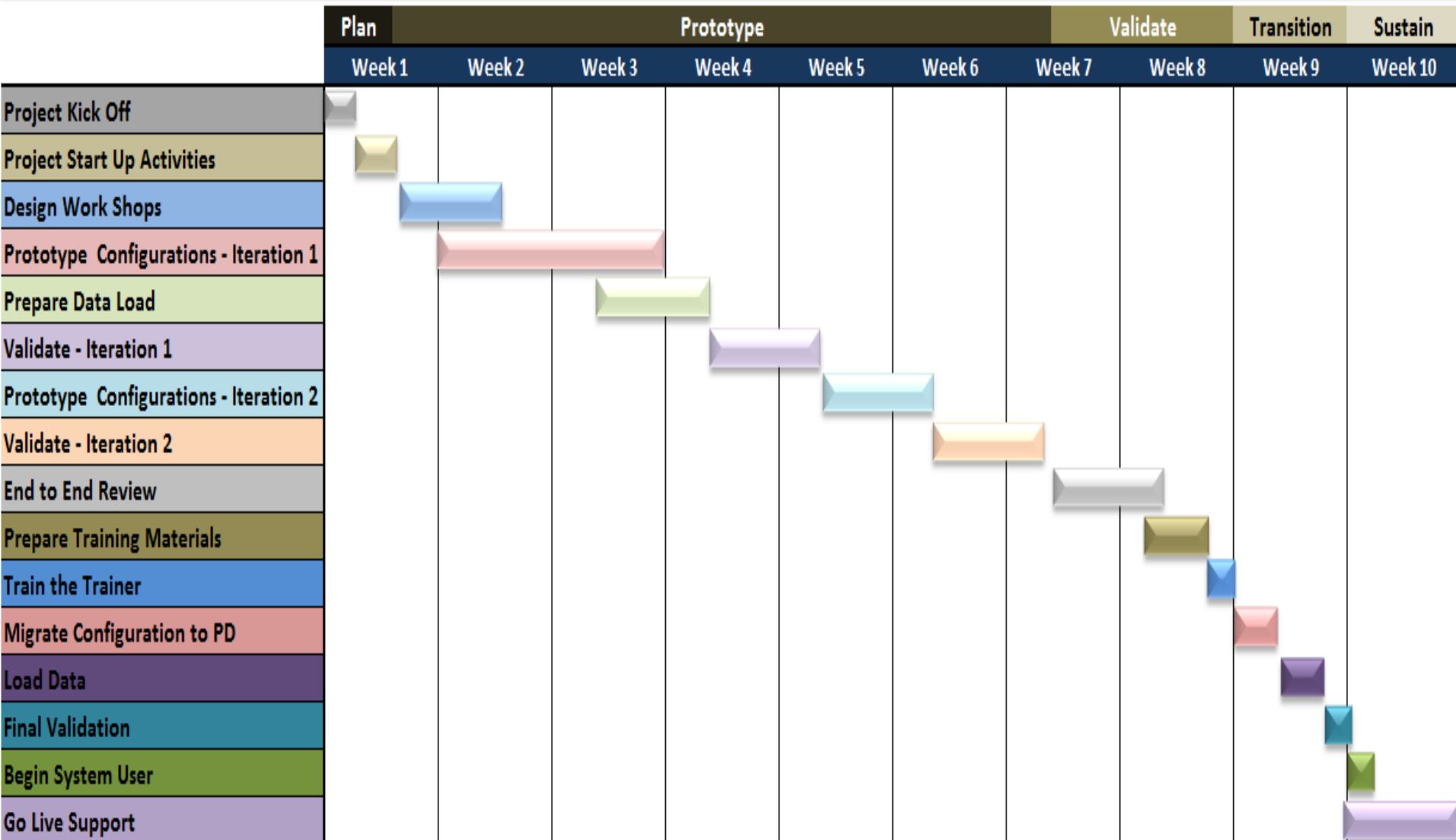
Iterative

Typical Deliverables

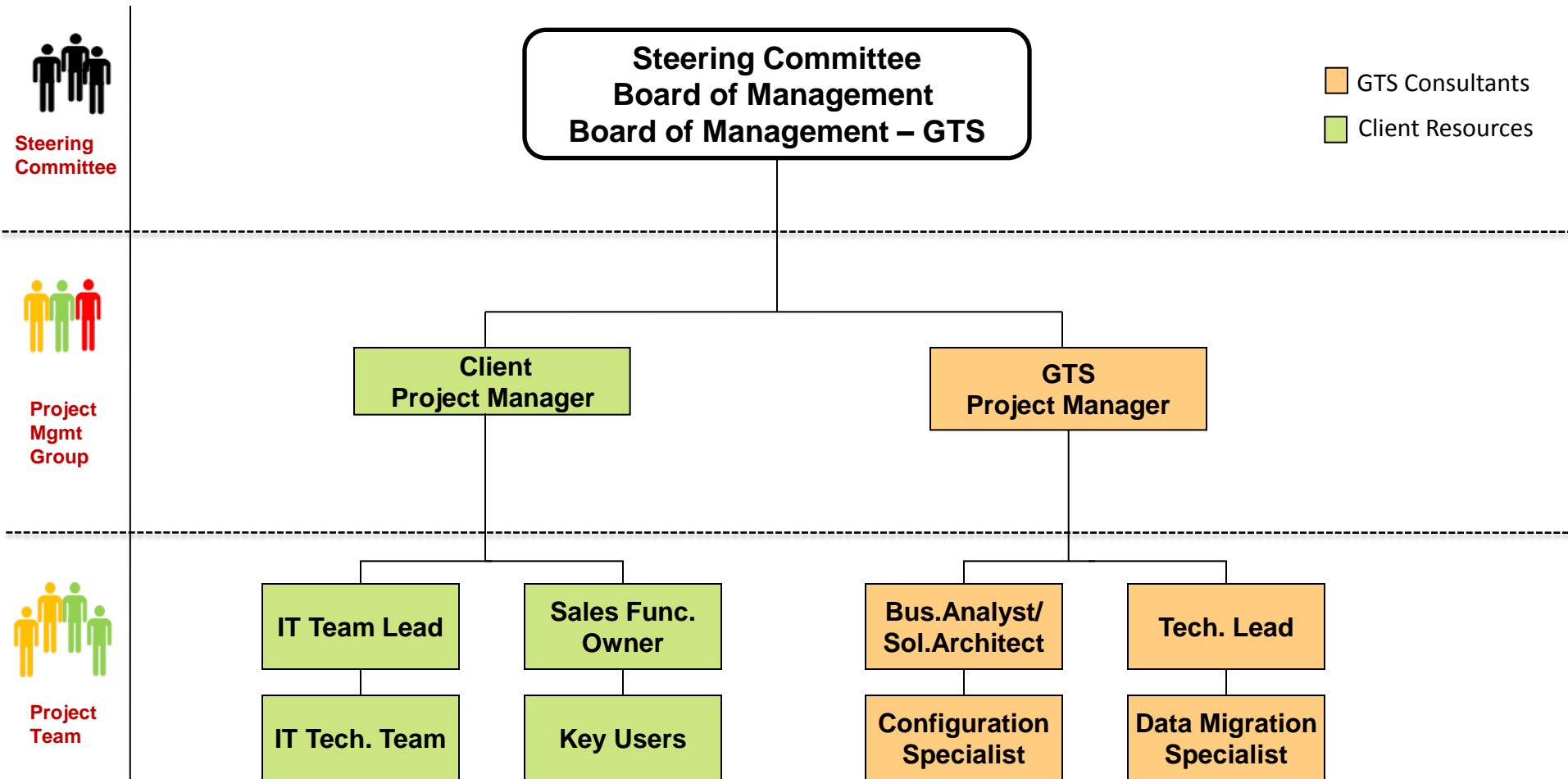


Deliverables included in Scope	Description
Project Charter	Details of Mission Statement, Approach and Execution
Project Wok Plan	High level tasks and timelines for all project activities
Set up Document	Summary of the configurations to be provided based on the collected business information
Configured Application	Development application configured in accordance with the descriptions in the Configuration Workbook
Test Plan and Scripts	Test Scripts for testing the configured functionality in the scope of standard offering.
Training Material	Material to support Familiarization sessions on tools for on going customers use
Configuration Workbook	Details of how the solution is configured
Validated Solution on Production	Configured Solution, validated for go live use

Project Plan and Time Frame



Project Organization Chart



Responsibilities



Role	Responsibilities
Project Manager	<ul style="list-style-type: none">• Day to day project activities.• Internal communication• Management of project resources• Progress reports and milestones• Issue and Risk Escalation
Business Analyst	<ul style="list-style-type: none">• Owner of Business requirements• Collects User feedback during different phases• Available as per project demand
Solution Architect	<ul style="list-style-type: none">• Owner of Business and Functional requirements• Mapping requirements to application• Designing access and visibility models• Development of solution prototypes
Configuration Specialist	<ul style="list-style-type: none">• Configuration of page and field layouts• System set up/ configuration• Implementation of visibility solution
Data Migration Specialist	<ul style="list-style-type: none">• Formatting and cleaning data• Data mapping• Validation of imported data

Responsibilities



Role	Responsibilities
Sales Function Owner	<ul style="list-style-type: none">• Responsible for the respective business domain.• Provides the business requirements.• Signs off process documents
Key User	<ul style="list-style-type: none">• Works closely with the Vendor• Available as per project needs• Owns certain tasks like providing data, testing, end user training etc.
IT Team Lead	<ul style="list-style-type: none">• Responsible for infrastructures required the project• Co ordinates between vendor team and key users/Function Owners

Customer Obligations



For the Project to be successful customer must fulfil the following obligations:

- ❖ Sales Cloud environments are available prior to the start of the project.
- ❖ Assign a Project Manager to lead internally.
- ❖ Assign experienced and empowered business/IT users who will work closely with GTS consultants according to the project plan.
- ❖ Own certain tasks like providing data in format specified, testing, assisting data conversions, assisting in training material preparations, end user training, data validations etc.
- ❖ Work with executive sponsor for forming project steering committee.

Assumptions



- ❖ The implementation is based on the Cloud deployment model, hosted at Oracle.
- ❖ In the Cloud deployment model, two project environments- Sand Box and Production will be available.
- ❖ The standard business flows and Fusion functionality will serve as the base for the implementation.
- ❖ Any changes to scope (Custom extensions, reports, integrations conversion) not listed in the proposal will be handled through the project change control process.

Assumptions



- ❖ System testing will be limited to only those items included in the scope of work
- ❖ All communications, documentations, deliverables would be furnished in English language.
- ❖ The project would be executed in an onsite-offshore model.
- ❖ Training will be provided using 'Train the Trainer' approach
- ❖ During the project duration, for any technical issues related to the product GTS be responsible for raising SR and resolution.

Exclusions

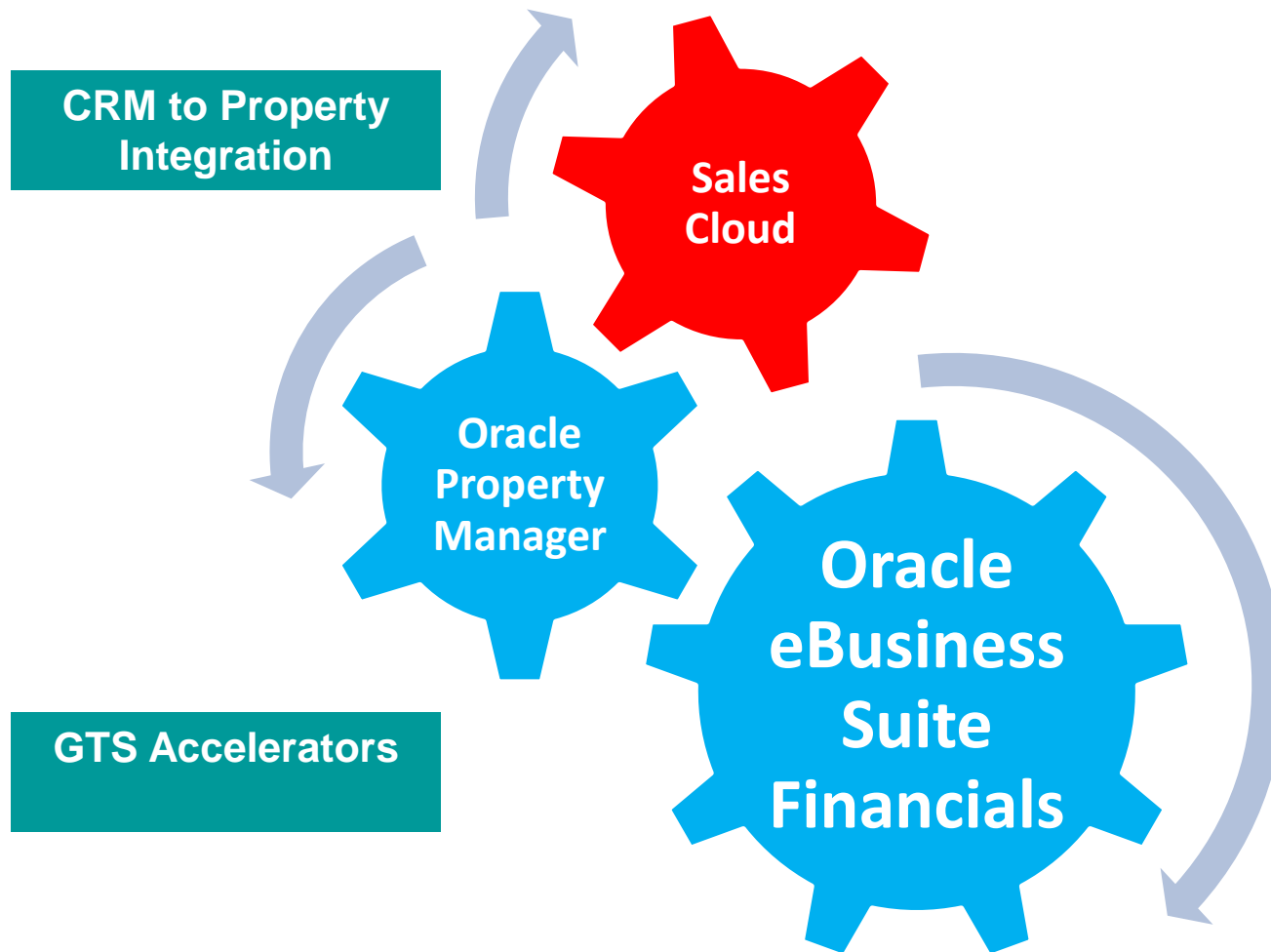


- ❖ Custom extensions, reports, integrations conversions not explicitly listed in the proposal.
- ❖ Data Conversion or extraction from current systems
- ❖ Data Cleaning
- ❖ Organizational Change Management
- ❖ End User Training
- ❖ Single Sign On Set up

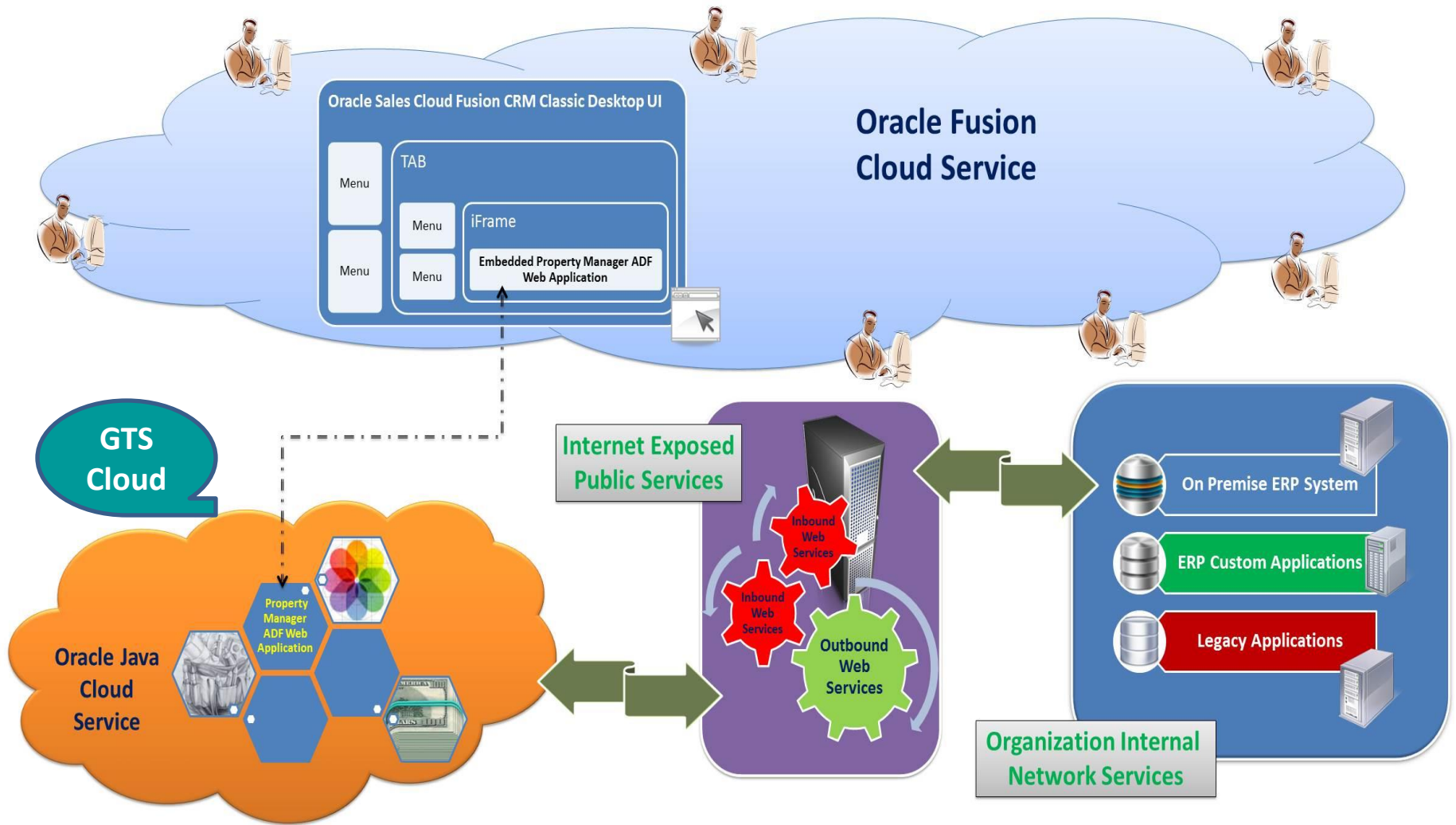


Sales Cloud Integration With GTS Property Extensions

Oracle Solution – Option 1



Fusion CRM Integration with Property



Fusion Sales Home Page



Apps Fusion

ORACLE®

Matt Hooper ▾

- Dashboard
- Leads
- Opportunities
- Sales Forecasts
- Accounts
- Households
- Contacts
- Schedule
- Analytics
- Social
- Navigator
- Notifications
- Settings
- Getting Started

Lead Summary



Dashboard Leads Opportunities Sales Forecasts Accounts Households Contacts Schedule

Leads: Less Than 3 Months Old ▾

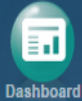
Show My Open Leads Create Lead

Rank	Name	Account	Deal Size	Status	Age in Days
	Kalidhas-2BR			Unqualified	0
	Test-2		\$500,000	Unqualified	1
	Test			Unqualified	1
	CLDLEAD MUNTAZIR	Muntazir Qamar	\$100,000	Qualified	1
	GLA Lead	Business World LLC	\$80,000	Unqualified	3
	4BHK-Apartment		\$60,000	Unqualified	3

Summary of My Leads Less than 3 Months Old

Unqualified Leads 5	Retired Leads 0	4
Qualified Leads 1		Converted Leads

Opportunity Summary



Dashboard



Leads



Opportunities



Sales Forecasts



Accounts



Households



Contacts



Schedule

Opportunities: Quarter 3, 2014 ▾

Show

Create Opportunity

Win %	Name	Customer	Revenue	Close Date	Sales Stage
100%	2BHK-Residential-HUD	ENOC PROPERTIES...	\$65,000	9/24/14	Contract
80%	Villa-3400-Limas	ENOC PROPERTIES...	\$2,000,000	9/24/14	Booking
40%	2BHK-JLT-Limas	Saleemullah	\$1,600,000	9/27/14	Site Visit
25%	Store Room	Sharaf DG	\$120,000	9/27/14	Offer Submission
20%	Villa-4500-Limas	ENOC PROPERTIES...	\$0	9/24/14	Reservation

Quarter	Potential Revenue	Won Revenue
Quarter 3, 2014	\$5,406,000	\$1,521,000
Quarter 2, 2014	\$391,450	\$0
Quarter 1, 2014	\$0	\$0

Quarter 3 Quota \$0

Quarter 3 Won Revenue \$1,521,000

Unit Availability in Fusion Sales



The screenshot shows the 'Edit Opportunity: Office-SDG-HUD: Property' page in Oracle Fusion Sales. The page is divided into two main sections: 'Search Parameters' and 'Search Results'. The 'Search Parameters' section includes dropdown menus for Type (LEASE), Context (<All Contexts>), Status (<All Statuses>), Category (<All Categories>), Property (<All Properties>), Building (<All Buildings>), and Floor (<All Floors>), along with input fields for Min. Area, Max. Area, Min. Rate, Max. Rate, Min. Price, and Max. Price. A 'Search' button is located below these fields. The 'Search Results' section displays a table with columns for Type, Location, Status, Category, Area, Price, and Expiry. The table contains 10 rows of data, all with a Type of 'LEASE'. A yellow callout box with an arrow pointing to the 'Property' dropdown menu in the search parameters section contains the text: 'The User can get the Unit Availability status by clicking on Property Tab and providing any search parameters'. The browser's address bar shows the URL 'https://cafh-test.crm.us2.oraclecloud.com/custom' and the page title 'Fusion Applications'. The Windows taskbar at the bottom shows the system tray with the date '9/7/2014' and time '4:41 PM'.

Type	Location	Status	Category	Area	Price	Expiry
LEASE	SBF10I	Leased Villa		500		0 31-DEC-...
LEASE	HUDB_	Availab FOOD &...		1,320	10,000	-
LEASE	HUDB_	Availab ENTER...		1,450	14,500	-
LEASE	HUDB_	Availab FASHIO...		1,210	14,500	-
LEASE	HUDB_	Availab FOOD...		1,360	13,600	-
LEASE	HUDB_	Availab SERVIC...		1,450	10,000	-
LEASE	HUDB_	Offered Villa		2,200	18,000	-
LEASE	HUDB_	Availab Apartme...		1,800	10,000	-
LEASE	HUDB_	Availab Villa		2,100	20,000	-
LEASE	HUDB_	Availab Apartme...		1,500	9,000	-

Property Tab

The User can get the Unit Availability status by clicking on Property Tab and providing any search parameters

Location Map at Unit Level



Search Parameters

Type: <All Types>

Context: <All Contexts>

Search Results

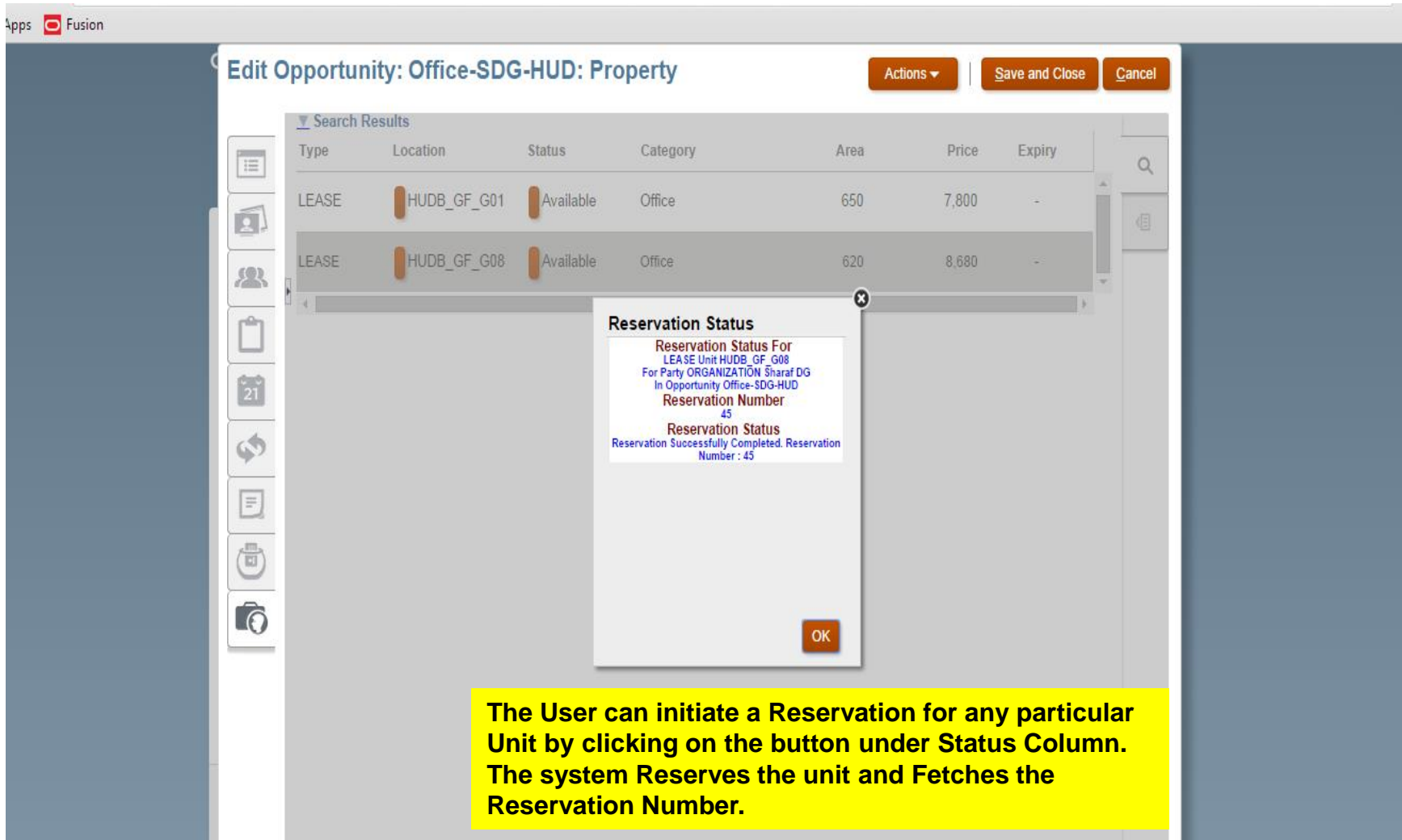
Type	Location	Status	Category	Area	Price	Expiry
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Location Map

Unit Map can be accessed by clicking on any unit.

OK

Initiate Reservation from Fusion Sales



The screenshot shows the Oracle Fusion Sales interface for editing an opportunity. The main window is titled "Edit Opportunity: Office-SDG-HUD: Property". It features a search results table with columns for Type, Location, Status, Category, Area, Price, and Expiry. Two rows are visible, both for LEASE units with status "Available". A modal dialog box titled "Reservation Status" is open, displaying the following information:

Reservation Status
Reservation Status For
LEASE Unit HUDB_GF_G08
For Party ORGANIZATION Sharaf DG
In Opportunity Office-SDG-HUD
Reservation Number
45
Reservation Status
Reservation Successfully Completed. Reservation
Number : 45

An "OK" button is located at the bottom right of the dialog box. A yellow text box at the bottom of the screenshot provides the following explanation:

The User can initiate a Reservation for any particular Unit by clicking on the button under Status Column. The system Reserves the unit and Fetches the Reservation Number.

View Reservation Details



Apps Fusion

Edit Opportunity: Office-SDG-HUD: Property

Actions ▾

Save and Close

Cancel

Reservation

Reservation Version **1**

Reservation Number **45**

Reservation Status **Draft**

Booking Date **2014-09-07 00:00:00**

Customer

Opportunity Name **Office-SDG-HUD**

Party Type **ORGANIZATION**

Person Name -

Person Phone -

Person Email -

Organization Name **Sharaf DG**

Organization Phone **971402587413**

Organization Email **info@sharafdg.com**

Contact Person Name **Jay Kumar**

Contact Person Phone **971402589635**

Contact Person Email **jay@gmail.com**

Location

Location Code **HUDB_GF_G08**

Reservation Type **LEASE**

Expiry Date -

Occupancy Status **Available**

Occupancy Context **COMMERCIAL**

Occupancy Category **Office**

Property Name **Hudaiba Properties**

Building Name **Al Hudaiba Awards**

Floor Name **Ground Floor**

Location Area **620**

Location Rate **14**

Location Price **8680**

Reservation Tab

The User can get complete details of the Reservation Number by clicking on Reservation Tab. As the Reservation progresses for further stages the Reservation Status gets updates in this form.

Reservation in "On Premise ERP"



File Edit View Folder Tools Window Help

Pre Lease Entry

Lease Header

Offer Number: 45 1 Offer Drafted: 07-SEP-2014 Lease Start Date: 07-SEP-2014
 Lessee Number: 29392 Lessee Name: Sharaf DG Lease End Date: 06-SEP-2015
 Leasing Executive: Lease Year: 1 Month: 0 Days: 0 Actual Start Date: 07-SEP-2014
 Status: Draft Offer Validity: Reminder: Actual End Date: 06-SEP-2015

Charges

Area in SMT: 620 Base Rent Per SMT: 14 Gross Rent: 8680
 Base Rent: 8680 Base Rent Template: Base Rent Template Proration Rule: 365 Days/Year

Terms

Spl Offer Terms: Offer Signed Date: Lease Signed Date: Billing Start Date: 07-SEP-2014
 Spl Contract Terms: Billing Start Date: 07-SEP-2014

Units Yearly Rent Deposits TurnOver Rent Resident Fit Out Tasks Approval Actions Comments Contract Status

Unit No	Assignable Area	Budgeted Rent	Achieved Rent	Monthly Rent	Annual Rent	Usage
HUDB_GF_G08	620	14	14	8680	104160	
	620			8680		

Record: 1/1 List of Valu <OSC>