**Facebook**

**Project Vulcan**

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| **PRD - Functional Design Document:**  **Salesforce – Fusion Customer Integration** |

Author   : Vijay Jhala

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| **Date** | **Author** | **Version** | **Change Reference/Description** |
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1. **Project Vulcan Overview**

1. **Purpose**

The purpose of this document is to provide the solution for the ARVR customer integration between Salesforce and Oracle fusion. B2B and Enterprise customer will be entered into Salesforce system by Sales Ops team. Once customer information is entered in Salesforce, it will be marked to be transferred to Oracle fusion. The scope of this integration includes pulling customer details from Salesforce and pushing them into Oracle fusion either to create customer in fusion for first time or update existing customer details in fusion. This integration will update Salesforce with Oracle fusion customer id to keep both systems in sync.

1. **Stakeholders and Project Team**

|  |  |  |
| --- | --- | --- |
| **Name** | **Role** | **Function** |
| Michael Crist | Product Data Management | Workstream Business Lead |
| Paul Dominic | CE Applications | Workstream CE Lead |
| Carol Cleary | Product Manager |  |
| Karla McKenzie | Product Manager |  |
| Cam Vo | QA | BET |
| Sean Bennet |  |  |
| Cole Jimison |  |  |
| Barbara Fowler |  |  |
|  |  |  |

1. **Timeline**

|  |  |  |
| --- | --- | --- |
| **Phases / Milestones** | **Date** | **Comments** |
| Kick-Off | [Insert Date] |  |
| Milestone 1 | [Insert Date] |  |
| Milestone 2 | [Insert Date] |  |
| Perform testing | [Insert Date] |  |
| Testing Completed | [Insert Date] |  |
| Ready to Ship | [Insert Date] |  |
| Ship to production | [Insert Date] |  |

1. **Dependencies**

* Agile data model merge

1. **Reference Documents**

|  |  |
| --- | --- |
| **Type** | **Source** |
| BRD | [Link](https://docs.google.com/document/d/1XuuokeliBEy1FGeYSXKxNpB1m9kGg_Lv9CoRwZ1woRA/edit#heading=h.17dp8vu) |
| Agile-PDH field mapping | [Link] |
| Item template mapping | [Link] |
| Item class mapping | [Link] |

1. **Scope Details**

1. **In scope**
   * Only B2B and Enterprise customers

1. **Out of Scope**
   * B2C and In-Direct customer will not be covered as part of this integration

1. **Assumptions and Risks**

Assumptions:

* NA

1. **Overall To-Be Process Flow**
2. **To-be Process Flow Diagram**

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1. **Requirement:**

Sales Ops team with partners (customers) to set them up in the Facebook system. Customers are initially set up in the Salesforce system but are required to be transferred to the fusion system for taking and fulfilling customer orders. To avoid double data entry and prevent manual errors it is required to have customer master details systemically transferred from Salesforce to Oracle fusion system.

As part of this systematic transfer process following requirements needs to be met:

* Ability to create new customer/party in Oracle cloud from Salesforce.
* Ability to create account and account sites.
* Ability to create new sites (Bill to/ Ship to) for existing customers.
* Ability to set payment terms, freight terms and EDI location code from Salesforce to Oracle.
* Ability to update payment terms, freight terms and EDI location from Salesforce to Oracle.
* Ability to sync back Oracle cloud customer number on Salesforce customer record.

1. **Solution:**

Oracle fusion maintains financial information which enforce more stringent security access requirements from the compliance team. Due to special security requirements, Salesforce cannot integrate directly with fusion using out of the box integration adaptor available to connect two systems. To circumvent this situation, an Intern system will be used to integrate Salesforce with fusion. Intern system will pull customer details from Salesforce and will pass it to fusion using SOAP APIs.

Key design considerations:

* A synchronous job will schedule to run every 10-15 minutes to sync customer details between Salesforce and Oracle Cloud.
* This job will pull customer details from Salesforce, capture it in the Intern database, call fusion customer API to create/update customer records in Oracle cloud, capture fusion customer number and site number and update Salesforce with details.
* Any error during this process will be captured in the Intern error table with supported UI to allow update and reprocess function.
* Any failure will be reported to the support team through email for task creation and remediation process.

**Functional Logic:**

An Intern program will pull customer details from Salesforce on a regular basis and check for any new customer added to Salesforce or any existing customer records update in the Salesforce system. Following logic will be used:

* Intern job will query for any new customer created or added in Salesforce from the last run of the program.
  + If new customer found, check if customer type is either B2B or Enterprise

A screenshot of a computer

AI-generated content may be incorrect.

* If yes, check if “Sync Account with Omega” is set to “yes” or checked
  + If Yes, extract customer account details from Salesforce address, payment term, freight term and EDI location code.
  + Check if customer records already exist in the Intern database. If not, insert customer account details including payment term, freight term in Intern customer account database.
  + Insert customer site details including address, purpose, Primary flag and EDI location code in Intern account site database.
  + Call fusion API to create customer accounts and sites in Oracle cloud.
  + Capture API response,
    - If success,
      * Update intern database for account and account site with fusion customer number and site numbers.
      * Call API to update Salesforce customer record with Fusion customer number as well as site number(s).
      * Move on to next customer record
    - If failure update Intern error database with error details and send email to support team for task creation and remediation.
* Else, ignore customer record and move to next customer
* Else if existing customer updated, check if customer type is either B2B or Enterprise
  + If yes, check if customer account details are updated by comparing to the Intern customer account database.
    - If yes, check for update field in Salesforce and update Intern account database with updated field
    - Check if Payment term or freight term is updated at account site level.
      * If yes, Call fusion API to update account details in Oracle cloud.
      * Capture API response,
        + If success, move on to next customer record
        + If failure update Intern error database with error details and send email to support team for task creation and remediation.
      * If failure update Intern error database with error details and send email to support team for task creation and remediation.
    - Else ignore site update and move on to next customer record
  + Else if yes, check if a new site is added to the customer by comparing to Intern customer account site database.
    - If yes, check if “Sync Account with Omega” is set to “yes” or checked at site level
      * If Yes, extract customer account site details from Salesforce including new address, purpose, primary flag freight term and EDI location code.
      * Check if account site records already exist in the Intern database. If not, insert account site details including purpose, primary flag, freight term and EDI location code in Intern customer account site database.
      * Call fusion API to create an account site in Oracle cloud.
      * Capture API response,
      * If success,
        + Update intern database for account site with fusion customer site number(s).
        + Call API to update Salesforce customer record with Fusion customer site number(s).
        + Move on to next customer record
      * If failure update Intern error database with error details and send email to support team for task creation and remediation.
    - Else ignore customer account sites until marked for sync with fusion.
  + Else check if the existing site is updated by comparing it to the Intern customer account site database.
    - If yes, check for update field in Salesforce and update Intern account site database with updated field
    - Check if Freight term, purpose, primary flag or EDI location code is updated at account site level.
      * If yes, Call fusion API to update account site details in Oracle cloud.
      * Capture API response,
        + If success, move on to next customer record
        + If failure update Intern error database with error details and send email to support team for task creation and remediation.
    - Else ignore site update and move on to next customer record
* Else, ignore customer records and move to the next customer available for sync with fusion.

Else, ignore other customer types.

Mapping between Salesforce and fusion is provided in Appendix A of this document.

Fusion customer master object details:

Organization Creation:

* Party Type: default to “Organization”
* Party Usage Code: default to “Customer”
* Organization Name: Account Name (Customer name)
* DUNS Number
* Party Original System: SFDC
* SFDC Account Name: Capture in EFF or Original system Reference

Party Site:

* DFF/EFF or Party Site Original System Reference: SFDC Site Number
* Party Site Name: SFDC Site Name/Oracle site name
* Party Site Number: SFDC Site Number/Oracle site Number

1. **Business Impact**

Below are the anticipated business impacts as a result of implementing a solution that meets the business requirements and acceptance criteria put forth in this document.

* 100% near real-time sync between Salesforce and Oracle cloud.

* Removing manual effort to update EDI location code and freight terms at customer accounts and site level will 100% of time spent today on updating customer details in Oracle EBS today.

* Removing manual updates on customer account detail will prevent human error and will provide transaction accuracy.

* Availability of maintain EDI Location code through this integration will 100% eliminate EDI 850 processing errors

1. **Business Metrics**

|  |  |  |  |
| --- | --- | --- | --- |
| **Metric** | **Current** | **Target** | **Impact** |
| Time |  | 0 per year | Completely eliminate time to update customer sites for EDI Location code |
| Time |  | 0 per year | Completely eliminate time to update customer sites for Freight terms |
| Time |  | 0 per year | Time reduce to resolve EDI850 errors due to EDI location code setup missing |
|  |  |  | Transactional accuracy with current and correct customer details |

1. **Configurations**

1. **Test Scenarios**

|  |  |  |  |
| --- | --- | --- | --- |
| Sl. # | Test Cases | Expected Results | Action Points |
| 1. |  |  |  |
| 2 |  |  |  |
| 3 |  |  |  |

1. **Open/Closed Issues**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Sl. # | Issue | Raised by | Raised Date | Disposition | Owner | Closed Date | Status |
| 1 | Finalize if Freight terms will be maintained at account level or site level or both | Vijay J | 6/17/2020 |  |  |  |  |
| 2 |  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |  |

1. **Scheduling and Integration Scheduling Details**
2. **Security and Responsibility**

1. **Technical Components/Objects**

|  |  |  |  |
| --- | --- | --- | --- |
| **RICEW** | **RICEW Description** | **Requirement Code** | **System (From)** |
| MDMINT-INT-1.1 | Agile – Intern | 1.1 | Intern |
| MDMINT-INT-1.2 | Intern – PDH | 1.1 | Intern |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

1. **Error Handling and Notifications**

Since Intern application directly calls the PDH API, we need to build an error handling at the Intern.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Sl. # | Message | Cause | eAction | Reprocess |
| 1 |  |  |  |  |
|  |  |  |  |  |

1. **Appendix**

**Appendix A – Salesforce – Fusion field mapping**

**SFDC and Oracle Field Mapping**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| SFDC Fields | Party | Account | Contact | Address |
| Name | \*Customer Name | \*Customer Name |  |  |
| City\_or\_Town\_\_c | City | City |  | City |
| Country\_\_c | Country | Country |  | Country |
| CurrencyIsoCode | Bank Account Currency | Bank Account Currency |  |  |
| Description | Address Description | Address Description |  | Address Description |
| DunsNumber | D-U-N-S Number | D-U-N-S Number |  |  |
| Name | \*Customer Name | \*Customer Name |  |  |
| Phone | Mobile Phone Number |  |  |  |
| Postal\_Code\_or\_Zip\_Code\_\_c | Postal Code | Postal Code |  | Postal Code |
| State\_Province\_\_c | State | State |  | State |
| Street\_Name\_\_c | \*Address Line 1 | \*Address Line 1 |  | \*Address Line 1 |
| Type | Account Type |  |  |  |
| Website | Web URL |  | Web URL |  |
| YearStarted | Account Established Date | Account Established Date |  |  |
| Account\_Number | Account\_Number\_SFDC | Account\_Number\_SFDC |  |  |
| EDI Location Code |  |  |  | EDI Location Code |
| Freight Terms |  |  |  | Attribute1 |
| Site Number | Site Number SFDC | Site Number SFDC |  |  |
| BillingAddress |  |  |  |  |
| BillingCity |  |  |  |  |
| BillingCountbfhghjurnbidclkjivnjnjgbglgennbiry |  |  |  |  |
| BillingState |  |  |  |  |
| BillingStreet |  |  |  |  |
| BillingPostalCode |  |  |  |  |
| ShippingAddress |  |  |  |  |
| ShippingCity |  |  |  |  |
| ShippingCountry |  |  |  |  |
| ShippingState |  |  |  |  |
| ShippingPostalCode |  |  |  |  |
| Website |  |  |  |  |

|  |  |  |
| --- | --- | --- |
| HZ Parties | | EntOrganization |
| \*Party Type | ORGANIZATION | - |
| Party Usage Code | CUSTOMER | - |
| Organization Name | R5-Microsoft Corporation | Name |
| DUNS Number | 232114884 | DunsNumber |
|  |  |  |
| HZ Party Sites | | EntOrganization |
| Party Site Name | R5-PHILLIPSBURG NJ | 999999 |
| Party Site Number | R5-55996585 | <System Generated> |
| Party Site From Date | 5/29/2020 | <System Date> |
| Identifying Address | N | <Need logic> |
| Descriptive Flexfield Segment1 |  |  |
| Descriptive Flexfield Segment6 | FALSE |  |
|  |  |  |
| HZ Party Site Use | |  |
| \*Part Site Use Type | BILL\_TO/SHIP\_TO | PrimaryBillingAddress  ShippingAddress |
| Primary Indicator | N |  |
| From Date | 29-May |  |
| Party Site Use Original System | SFDC |  |
| Original System Party Site Use Reference | R5-82191484 |  |
| Party Site Original System Reference | R5-85561349 | SalesforceID |
|  |  |  |
| HZ Cust Accounts | |  |
| Customer Account Source System Reference | R5-49776707 | SFDC ID |
| Party Original System Reference | R5-36558326 | SFDC ID |
| Account Number | R5-3574670 | <System Genrated> |
| Account Description | 2324465 | LegalEntityName |
| Account Established Date | 10/27/2015 | <EntOrg Creation Date> |
|  |  |  |
| Cust Account Sites | |  |
| Customer Account Source System Reference | R5-57032713 | CA-SFDC |
| Account Site Source System Reference | R5-49884569 | CAS-SFDC |
| Party Site Original System Reference | R5-85561687 | PS-SFDC |
| \*Account Address Set | CONSUMER HARDWARE BU | USA OPS BUSINESS UNIT |
| From Date | 5/29/2020 | <EntCRMAdd Creation Date> |
| Descriptive Flexfield Segment3 | COLLECT | <FreightTerm> |
|  |  |  |
| Cust Account Site Use | |  |
| Account Site Source System Reference | R5-49884675 |  |
| Account Site Purpose Source System Reference | R5-53561000 | SalesforceID |
| \*Purpose | SHIP\_TO | PrimaryBillingAddress  ShippingAddress |
| Site | Burlington-82192370 | City||Street1||Street4 |
| \*Account Address Purpose Set | CONSUMER HARDWARE BU | USA OPS BUSINESS UNIT |
|  |  |  |
|  |  |  |
|  |  |  |
| HZ Location | | EntCRMAddress |
| Location Original System Reference |  | SalesforceID |
| Country | (US) | Country |
| Address Line 1 | (1465 University Dr) | Street1 |
| Address Line 2 |  | Street2 |
| Address Line 3 |  | Street3 |
| Address Line 4 |  | Street4 |
| City | (Burlington) | City |
| State | (NC - North Carolina) | State |
| Postal Code | (27215-8768) | PostalCode |
| Sales Tax Inside City Limits | 1 | nvl(SalesTaxInCityLimitsID,1) |
| Validation Indicator | (N) | nvl(ValidationStatus,’N’) |

|  |  |  |
| --- | --- | --- |
|  |  |  |
| HZ Cust Profile | | EntOrganization |
| Customer Profile Class | FB DEFAULT |  |
| Collector Name | Default Collector |  |
| Included in Credit Check | Y |  |
| Credit Hold | N |  |
| Override Terms | Y |  |
| Payment Terms | (NET 30) | PaymentTerms |
| Grouping Rule | Default |  |
| Currency | (USD) | AccountCurrency |