# Oracle Sales Cloud Migration Utility for Oracle CRM On Demand

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The Oracle Sales Cloud Migration Utility automates much of the migration process by transferring configuration settings and data from Oracle CRM On Demand to Oracle Sales Cloud. The Migration Utility ensures rapid and accurate replication of an environment by creating objects, fields and configuration settings and offering multiple validation checkpoints. Partners can focus on process improvements and value-added services rather than manually creating hundreds of fields.

**KEY FEATURES**

- Automatically creates standard and custom objects and associated fields
- Migrates users, sales methods, product catalog, currencies, assessments and audit trail
- Imports and validates data
- Recreates analytics reports

**KEY BENEFITS**

- Saves time by automating most tedious migration tasks
- Ensures accuracy when replicating fields and objects
- Full validation of imported data
- Creates opportunities for value added services

## Augment Professional Services

Whether implementing a new instance of Oracle Sales Cloud or migrating from Oracle CRM On Demand, the Oracle Sales Cloud Migration Utility should be included as part of a comprehensive methodology. Requirements definition, design, user acceptance testing and other steps are all needed to ensure success. The Oracle Sales Cloud Migration Utility automates time consuming and repetitive tasks, such as creating fields and objects, and provides opportunities for value-added services such as:

- Data quality and enrichment
- Streamlining workflow and business processes
- Improving analytics
- Mobile application customization
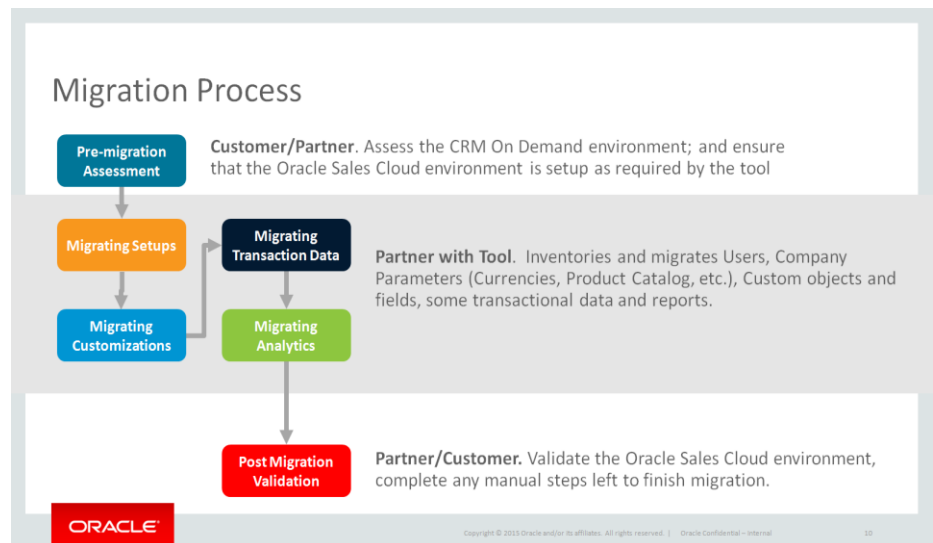- Replicating custom integrations



Image 1: The Oracle Sales Cloud Migration Utility process flow

## Automate the Tedium

Replicating existing configurations is a costly and resource-intensive task. The migration process involves dozens of objects, hundreds of fields, multiple users/roles and more. Working manually from a list or spreadsheet presents a high risk for errors.  The Migration Utility significantly reduces risk and improves resource allocation and accuracy by automating these tasks:

• Creating custom fields on standard objects

• Establishing custom objects and all their fields

• Building associations between custom and standard objects

• Recreating the sales methodology, currency values and product catalog

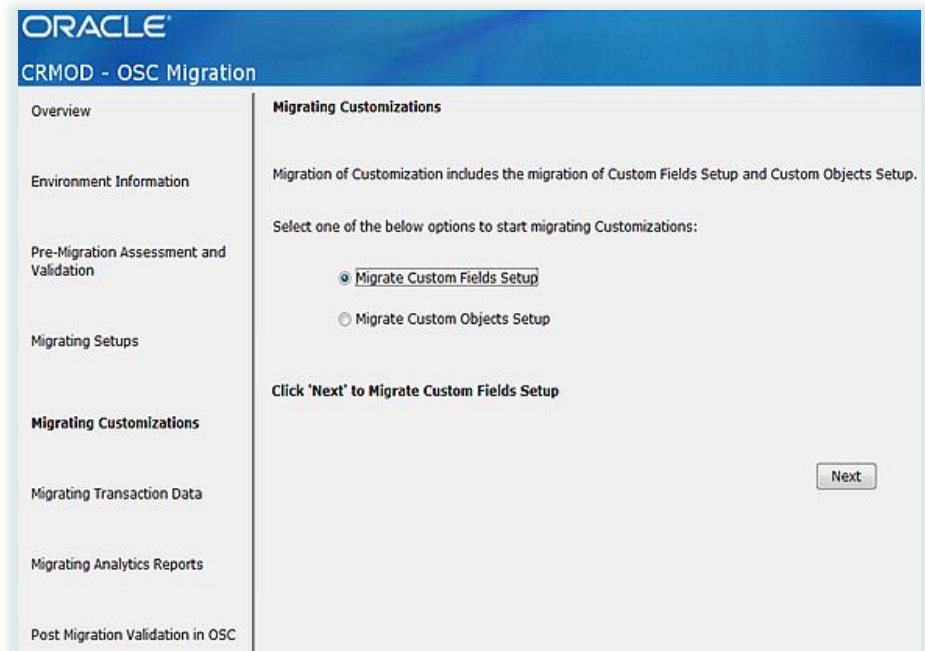• Importing users and associated roles

• Migrating assignment rules



Image 2: Migrate custom fields and objects from Oracle CRM On Demand.

## Import Data

Once the metadata is in place, the next step is to import the data.  The Migration Utility validates all files exported from CRM On Demand to check for issues such as missing or duplicate columns and does the following before importing the files to Oracle Sales Cloud:

• Provides default field mapping for standard objects and allows mapping for custom objects

• Validates files exported from CRM On Demand against field mapping

• Modifies validated files to include lookups and associations needed for import to Oracle Sales Cloud

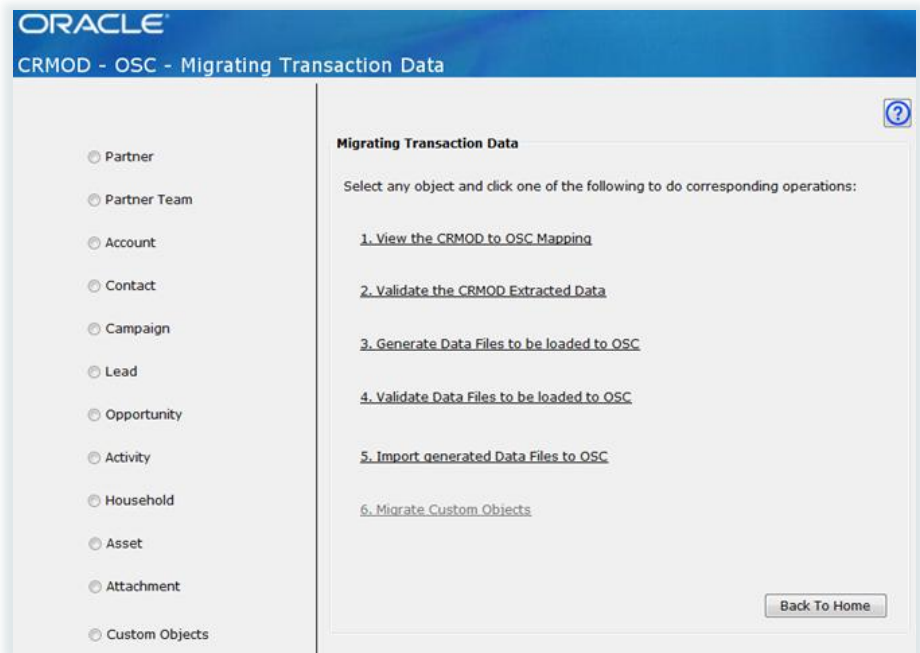• Checks data types, field length, required fields, regular expression validations, and more

Image 3: Validate and Import data using the Migrating Transaction Data page

## Jump Start Analytics

Providing improved reports accelerates the value of a new application after migration. The Migration Utility creates an inventory of CRM On Demand reports and recreates them in Oracle Sales Cloud. Once in oracle Sales Cloud, the reports can be improved upon by adding new visualizations and graphics, providing mobile access and highlighting key performance indicators.
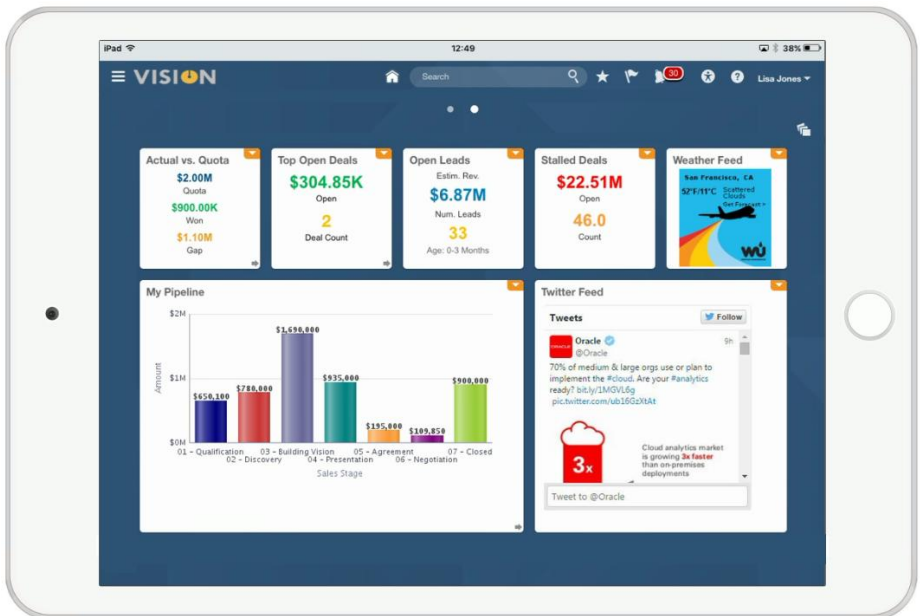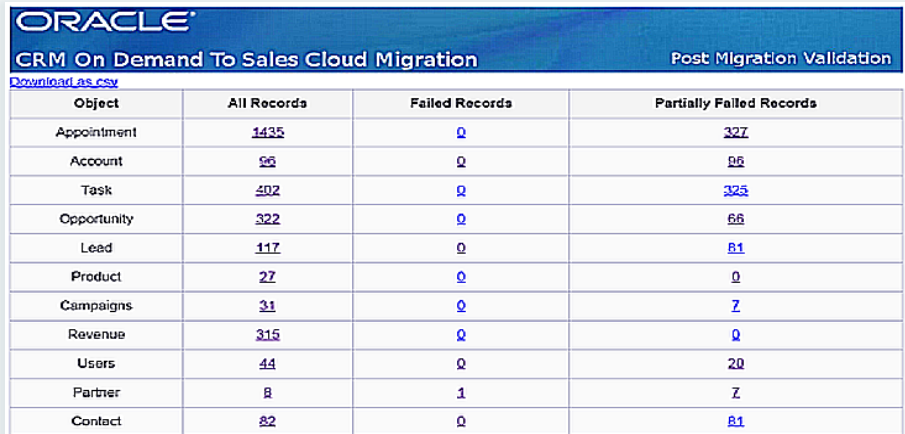


Image 4: The Oracle Sales Cloud homepage focuses on key performance indicators.

## Post-Migration Checkup

Once objects and fields are created and data is imported, the next critical step is to review and check for accuracy. To accomplish this, the Oracle Migration Utility exports everything from Oracle Sales Cloud and compares it to the original export files from CRM On Demand. A simple report shows any records that were not imported and those that partially failed, saving time and making a manual data analysis exercise unnecessary.



Image 5: The Post-Migration report; highlights total records imported or not imported, by object.

## Bottom Line

The Oracle Sales Cloud Migration Utility is a powerful tool available to partners at no cost to help migrate customers from Oracle CRM On Demand to Oracle Sales Cloud. Coupling automation with existing implementation methodologies enables implementation teams to focus on value-added services, gain efficiencies and migrate applications in a way not possible with existing APIs.

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