tmforum

Product Conformance Certification Report

Business Process Framework
&
Information Framework
v22.0

For

Salesforce Industries Order Management

February 24th, 2023

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1   Introduction

1.1   Executive Summary

This document provides details of Salesforce self-assessment and TM Forum's Conformance Assessment of Salesforce products – **Industries Order Management Release Winter 23**, against the following TM Forum ODA 22.0 components:

- Business Process Framework (eTOM) version 22.0
- Information Framework (SID) version 22.0

The assessment included a review of:

- Conformance to the Business Process Framework (eTOM) and Information Framework (SID) Release 22.0, according to the specific L3 process elements and ABEs submitted in scope for the Assessment.

    For more information on the Salesforce COM solution, please contact Meenakshi Ganesh (meenakshi.ganesh@salesforce.com)

    For any additional information on this Frameworx Conformance Certification Report, please contact TM Forum at: conformance@tmforum.org.

1.2   About Salesforce

Salesforce is the #1 CRM, bringing companies and customers together in the digital age. With the Customer 360, Salesforce's platform and engagement apps, Salesforce helps break down the technology silos between departments to give companies a complete view of their customer everywhere a customer might interact with their brand. Specifically for communications service providers, Salesforce built Communications Cloud, which inherits all the power of the Salesforce platform as well as industry-specific innovation that's built in alignment with TM Forum industry standards. With Salesforce, operators can transform their customer and employee experiences by accelerating digital channel adoption, reducing product launch cycles, and streamline order capture, fulfillment and delivery. For information, please visit https://www.salesforce.com/solutions/industries/communications/communications-cloud/

2   Product Functionality/Capability Overview

2.1   Product Overview - Salesforce Industries Order Management Release Winter 23

Salesforce Industries Order Management enables CSPs to deliver perfect orders with a catalog-driven approach that allows for real-time visibility into the fulfillment process. It enables them to rapidly respond to changing market and network demands with a next-generation order management system, giving you end-to-end agility across your BSS/OSS stacks. With Industries Order Management, communications service providers can improve the customer experience and reduce order fallout for both businesses and subscribers with a modular order management system. For more information, please visit https://help.salesforce.com/s/articleView?id=ind.order_mgmt_industries_order_management.htm&type=5

2.1.1   Benefits of Salesforce Industries Order Management

Industries Order Management provides the following benefits:

1. **Reduce Time-to-Market for New Offers**: Drive revenue from new offers faster by making cross-team collaboration easier with a unified view of both commercial and technical products.

2. **Avoid Duplication of Fulfillment Data**: Give users visibility into what is being offered and how it is fulfilled, while empowering them to see how their modeling decisions impact the solution.

3. **Reduce Order Fallout**: Deliver accurate orders with a catalog-driven approach that provides full visibility into the rules required to both sell and fulfill orders.

4. **Get Real-Time Views into Order Fulfillment**: Gain insight into the progress of fulfillment during customer interactions with the ability to see process flows in real time and quickly identify the location and cause of errors.

5. **Give Customers Order Transparency**: Elevate traditional back-office functions into the front office with increased visibility to ensure orders can be fulfilled during customer interactions.

6. **Easily Create Configurations**: Break down silos and enable product managers and fulfillment designers to effortlessly collaborate when creating configurations.

7. **Order Management Analytics**: CPQ Order Status Notification Management displays asynchronous status updates on in-flight orders. Search, sort and filter user actions are supported to enable user to gain visibility into order status updates and to take actions on orders that have been rejected by Order Management. OM Analytics provides Real-time churn-risk information and next-best action recommendations.

2.1.2   Product Capabilities and Architecture

The table below highlights a few key capabilities available in Industries Order Management.

Capability	Description
Collaborative Design Time Configuration	Industries Order Management Design Time Environment is used to define and manage the rules required to fulfill orders. Industries Order Management is closely tied to the Shared Catalog, a capability of Communications Cloud. Together the two applications comprise a catalog-driven capability with a unified end-to-end view of both commercial and technical fulfillment entities, allowing users to rapidly collaborate in modeling and testing offers.
Order Decomposition	The first step in fulfillment processing is to decompose the order into suborders tailored for specific downstream systems. The decomposition process includes enriching the original order by executing rules that derive the technical entities required to fulfill the order. At runtime, users can view the results of the decomposition process and visualize the relationships between the commercial entities on the order and the technical entities generated by decomposition.
Order Orchestration	Industries Order Management controls the interactions with third-party fulfillment systems such as billing, shipping, workforce management and inventory, and dynamically generates, sequences and monitors tasks in the orchestration plan. Fulfillment system interaction logic can be configured using a next generation Extract, Transform, Load workbench. This is supported by the ability to customize fulfillment system interaction logic at a much deeper level if needed via Salesforce APEX. Industries Order Management also supports both asynchronous and synchronous fulfillment system interactions for long-running orders.
Order Handling,	Industries Order Management includes a comprehensive set of

Capability	Description
Tracking, and Lifecycle Management	features for handling, tracking, and managing the lifecycle of orders in the system. These features are key to being able to quickly identify current order status, where the order is in the fulfillment workflow, and understand what fulfillment actions have already been taken on an order. Order tracking functions are supported by a service-level agreement and Jeopardy management capability that can be used to detect when orders are taking more time to fulfill than normal.
Manual Tasks and Work Queues	Industries Order Management provides extensive capabilities to support manual tasks within the workflow where human interaction is required to further progress fulfillment. This includes the ability to automatically route tasks to specific users for handling, guided manual task resolution (with accompanying design workbench), as well as bulk task re-assignment and completion functions.
In-Flight Order Cancellation	The In-flight Order Cancellation provides service agents with the ability to cancel an order that is in progress. This feature includes support for configuration of points-of-no-return (PONR) within the process flow, which prevent service agents from canceling orders that have progressed too far as well as the ability to control the way in which rollback occurs.
In-Flight Amendments	Industries Order Management supports a wide range of use cases that allow amendments to be performed on orders that are in progress. This feature includes the ability to change attribute values as well as add or delete one or more products from an order. It also includes support for configuration of points-of-no-return (PONR) within the process flow, which prevent service agents from amending orders that have progressed too far as well as the ability to control the way in which rollback occurs.

Figure 1 describes the overall lifecycle of an Order in Industries Order Management
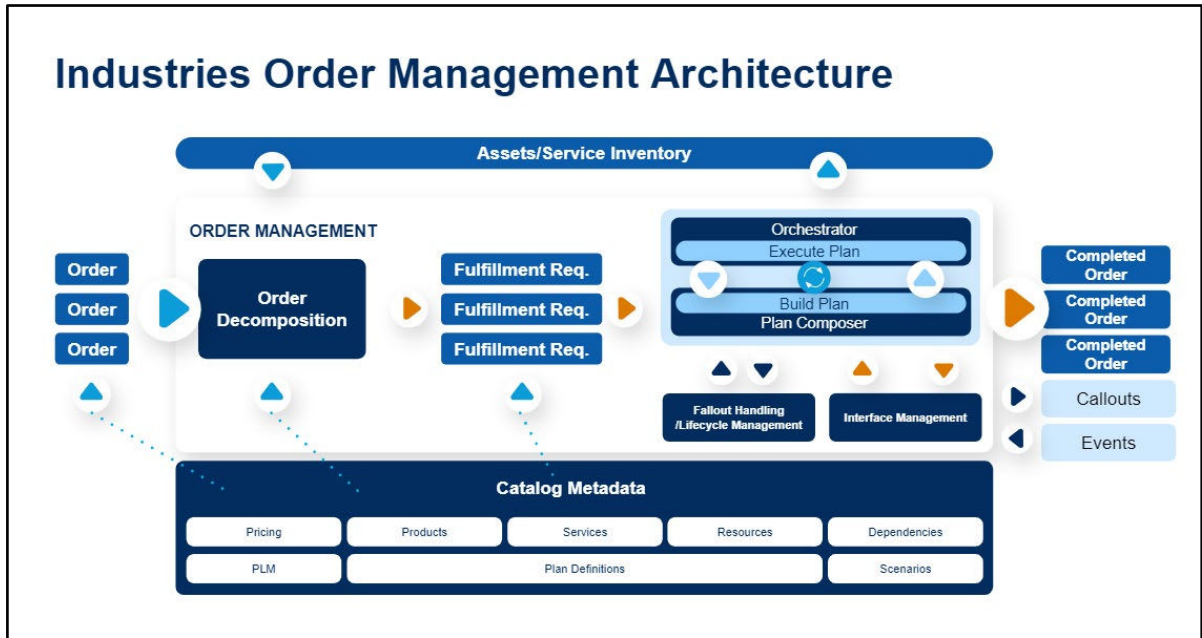
Figure 1- **Functional Architecture of Salesforce Industries Order Management**

2.2   Supported Installation Models: Salesforce Industries Order Management

Salesforce Industries Winter '23 Release, as in all Salesforce products and applications, are available in Salesforce's release notes (Winter '23 Release Notes for Industries Order Management). For additional information, please refer to the Help Documentation for Industries Order Management.

Hyperforce, Salesforce's next-generation infrastructure architecture, is designed to deliver Salesforce services for the all-digital, work-from-anywhere world. Hyperforce scales Salesforce to new geographies on top of public cloud infrastructure to support the growth and success of an enterprise's global customer base. For more information on how to future proof your digital investments with Hyperforce, please refer to the Hyperforce datasheet

2.3   Product Scope

The table in figure below represents Salesforce COM product with mappings to the Business Process Framework L3 process elements and Information Framework ABEs that were submitted in scope for the Conformance Certification assessment.

Salesforce Industries Order Management Release Winter 23 eTOM Certification Scope = 15 L3 processes			
1.3 - Customer Domain			
	1.3.3 - Customer Order Management		
		1.3.3.1 - Determine Customer Order Feasibility	X
		1.3.3.2 - Authorize Credit	X
		1.3.3.4 - Complete Customer Order	X
		1.3.3.5 - Issue Customer Orders	X
		1.3.3.6 - Report Customer Order Handling	X
		1.3.3.7 - Close Customer Order	X
		1.3.3.8 - Manage Order Fallout	X
		1.3.3.9 - Customer Order Orchestration	X
1.6 - Business Partner Domain			
	1.6.8 - Business Partner Order Management		
		1.6.8.1 - Select External Business Partner for Business Partner Order	X
		1.6.8.2 - Determine Business Partner Pre-Order Feasibility	X
		1.6.8.3 - Track & Manage Business Partner Orders	X
		1.6.8.4 - Receive & Accept Business Partner Order	X
		1.6.8.5 - Issue Business Partner Order	X
		1.6.8.6 - Report Business Partner Orders	X
		1.6.8.7 - Close Business Partner Order	X

Figure 2 - Salesforce Industries Order Management mapped to eTOM elements in scope

Industries Order Management Release Winter 23 = 4 ABEs	
Level 1 ABEs	
Customer Domain	
Customer Product Order ABE	
Product Domain	
Product Order ABE	
Common Domain	
Agreement ABE	
Business Interaction ABE	

Figure 3 - Salesforce Industries Order Management mapped to SID elements in scope

2.4 Business Process Framework (eTOM) and Information Framework (SID) Certification Scope

The following two figures represent respectively the Business Process Framework (eTOM) L3 process elements, as well as the Information Framework (SID) ABEs that were presented in scope for conformance certification for Salesforce Industries Order Management Release Winter 23.
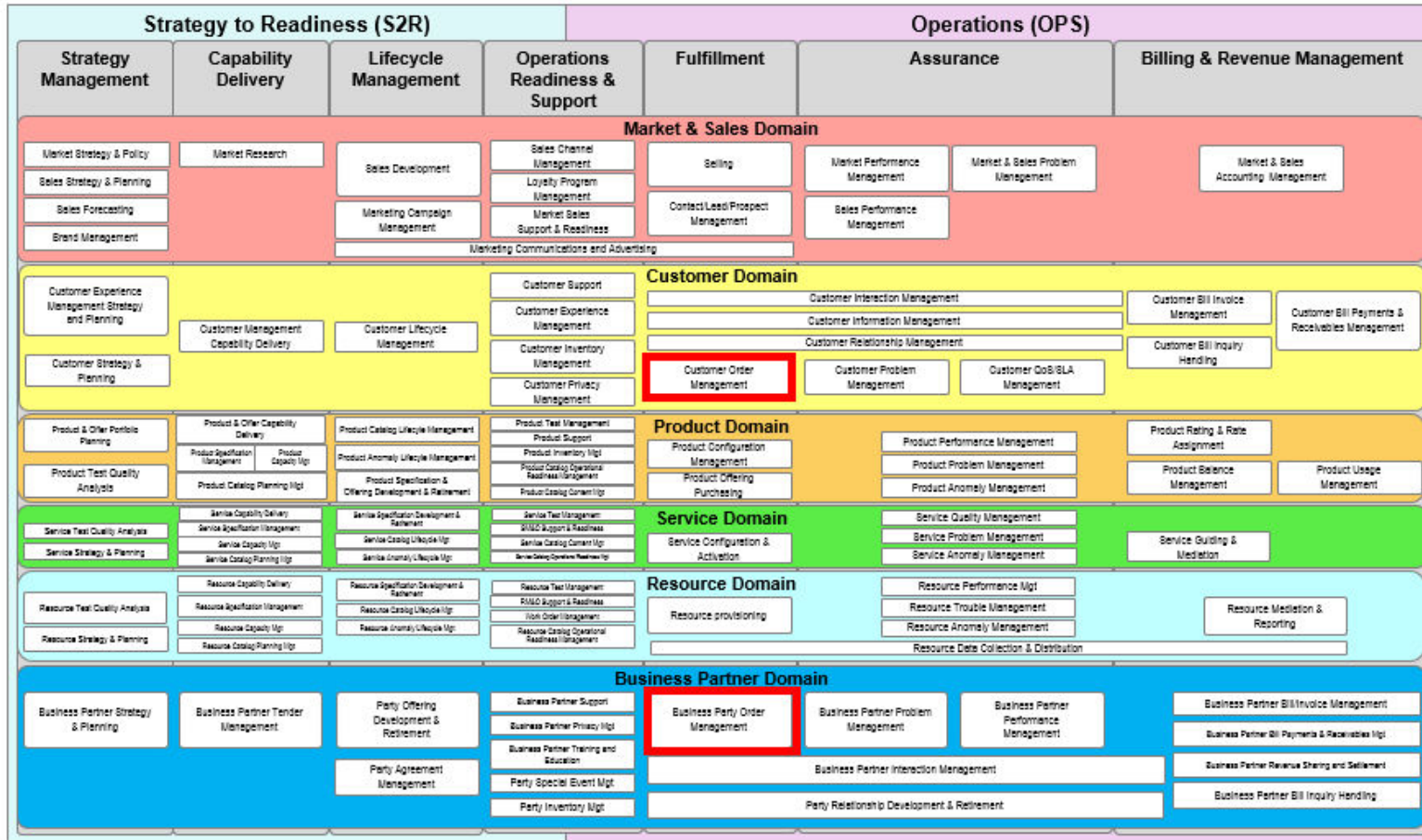
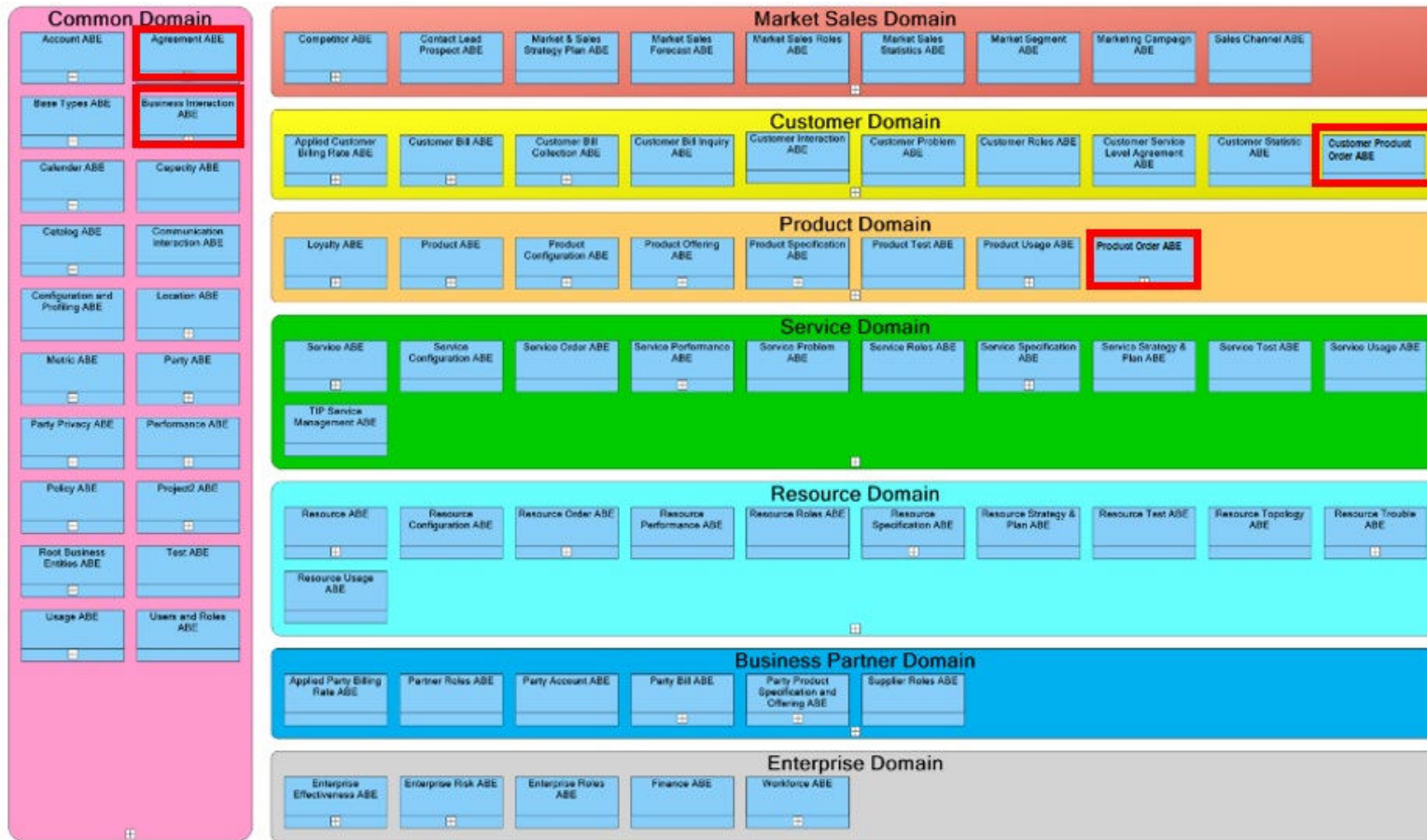**Figure 4 - Salesforce Industries OM mapped to eTOM elements in scope**

Figure 5 - Salesforce Industries OM mapped to Information Framework (SID) elements in scope

Business Process Framework Assessment Overview

Mapping Technique Employed

Business Process Framework Level 3 descriptions are analyzed by focusing on implied tasks also referred to as implied functional requirements. (This is similar to how process decomposition can use Semantic Analysis). Each Business Process Framework process is supported by descriptive text. In many cases, each process is aligned and mapped to appropriate company documentation references solution, methodology or modeling material.

Color coded text as highlighted below is used as part of the process mapping whereby highlighted text indicates the level of support for a Level 4 process implied task:

- GREEN is used to highlight key words or key statements that are fully supported
- YELLOW is used to highlight key words/key statements that are partially supported
- GREY is used to highlight key words/key statements that are not supported
- No highlighting is used for words/statements that are irrelevant, just for reference or needed to complete the sentence.

As of February 2018, TM Forum allows mappings to be provided against Level-3 process elements when:

- L3s have relevant, consistent full detailed descriptions reflecting all L4 process elements in their decomposition (usually implied tasks identified and separated by bullet points)

Manual and Automated Support

It is important to determine whether the implied task is supported by manual steps, automated steps, or a combination of both. In this document, "A", "M", or "AM" is used for each task to indicate that the step or steps is/are automated (A), manual (M), or both (AM).

TM Forum Note 1:

Process mappings are presented against Level 3 processes, the mappings are most often provided against the Level 3 Extended description. If an Extended description is not defined, then the mapping is provided against the Brief description.

Scope of Conformance Certification (eTOM)

This document conveys information about the Business Processes implemented by Industries Order Management Release Winter 23 in accordance to the TM Forum Business Process Framework. It also maps the processes with the Level 2 and Level 3 frameworks Activities. The document covers the following L3 Processes in scope for certification.

Scope of Conformance Certification – List (eTOM)

Salesforce Industries Order Management Release Winter 23 eTOM Certification Scope = 15 L3 processes		
1.3 – Customer Domain		
1.3.3 – Customer Order Management		
1.3.3.1 - Determine Customer Order Feasibility		X
1.3.3.2 - Authorize Credit		X
1.3.3.4 - Complete Customer Order		X
1.3.3.5 - Issue Customer Orders		X
1.3.3.6 - Report Customer Order Handling		X
1.3.3.7 - Close Customer Order		X
1.3.3.8 - Manage Order Fallout		X
1.3.3.9 - Customer Order Orchestration		X
1.6 – Business Partner Domain		
1.6.8 – Business Partner Order Management		
1.6.8.1 - Select External Business Partner for Business Partner Order		X
1.6.8.2 - Determine Business Partner Pre-Order Feasibility		X
1.6.8.3 - Track & Manage Business Partner Orders		X
1.6.8.4 - Receive & Accept Business Partner Order		X
1.6.8.5 - Issue Business Partner Order		X
1.6.8.6 - Report Business Partner Orders		X
1.6.8.7 - Close Business Partner Order		X

Figure 6- Level 3 process list in scope for certification - COM

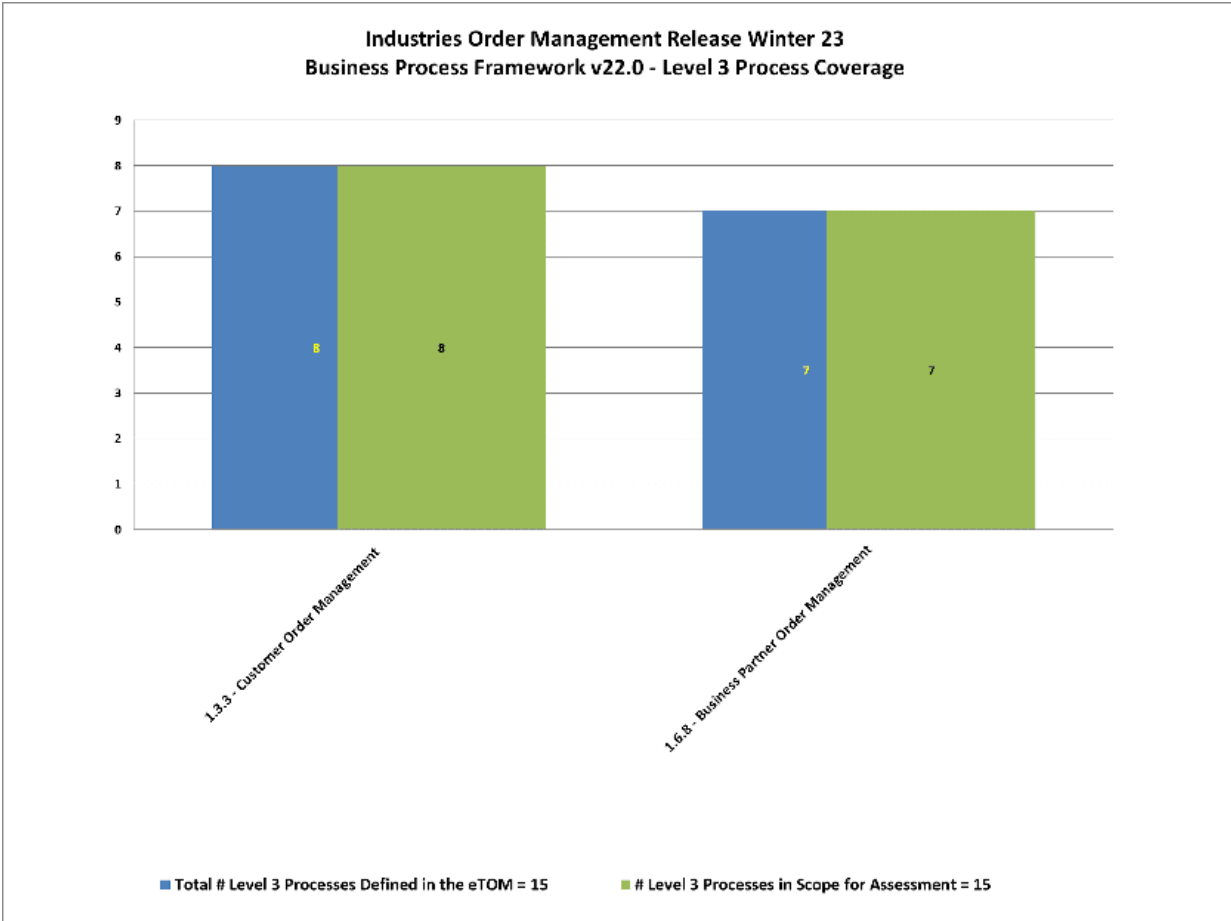# Scope of Conformance Certification – Chart (eTOM)

Figure 7- Level 3 process scope for certification - COM

Business Process Framework – Scoring Guidelines

This section provides the Process Mapping output from the self-assessment carried out by TM Forum Subject Matter Experts alongside supporting documentation made available for this purpose.

eTOM Business Process Framework - Conformance Certification (Product/Solution/Implementation)		
Business Process Framework (eTOM) - Conformance Score Methodology		
Process Level	Conformance Score	Qualifier
Level 1 Process	Not applicable	Conformance Assessment shall not be carried out at this process level.
Level 2 Process	Not applicable	A conformance level is not awarded to Level 2 processes in Frameworx Certification. The Certification Report shall highlight the coverage within a Level 2 process submitted in scope for an Assessment, in terms of number of Level 3 processes submitted for assessment out of the total number defined in the Business Process Framework for the Level 2 process.
Level 3 Process	Conformance Score is awarded between 3.0 & 5.0	The Conformance Score is awarded for each Level 3 process submitted in scope for the Assessment. The Conformance Score awarded can be a value between 3 & 5 depending on the level of coverage & conformance to the Level 3 process based on the alignment to the level 3 process definitions. A score of 5 indicates that the process is fully conformant with no deviations. A score of 4.5 indicates a process that is almost fully conformant, but displays some minor deviations from the standard. A score of 4.0 indicates a process that is partially conformant as it displays some deviations (not severe but not minor either) from the standard. A score of 3.5 indicates a process that is partially conformant as it displays major deviations from the standard. A score of 3.0 indicates a process that is not conformant as it displays no alignment or conformance at all with the standard.
Additional Notes		
Note 1 - Level 2 processes shall be presented to define the assessment scope only. i.e. they shall not be assessed as self-contained processes since the level of detail is not considered sufficient. A conformance level shall not be awarded for Level 2 processes. However, the Certification Report shall provide good indication of the coverage of the Level 2 process in terms of number of contained Level 3 processes submitted in scope for the Assessment.		
Note 2 - The Conformance Assessment shall be carried out at process level 3. For each Level 3 process, conformance shall be deduced according to the support for the process implied tasks, as described in the process descriptions. The score awarded for a Level 3 process, is deduced according to the support mapped to the L3 process' implied Tasks.		
Note 3 - In evaluating conformance to the standards, manual intervention shall not impact the conformance score granted. However, any level of manual support shall be noted in the Conformance Report and Detailed Results Report. _This note specifically applies to Implementation type of Assessments only._		
Note 5 - Processes that are supported via manual implementation _only_, are not considered in scope for the Assessment. _This note specifically applies to Product & Solution Assessments._		

Figure 8- TM Forum Business Process Framework: Conformance Scoring Rules

Conformance Result

This Section details the Scores awarded to reflect Conformance to the Business Process Framework components of eTOM.

TM Forum Assessment Scoping Document - Business Process Framework (eTOM) v22.0			
Member:	Salesforce		**Level 3 Process Elements Scores achieved**
Product:	*Industries Order Management Release Winter 23*		
Assessment Type	Product		
# of L3 Processes in Scope:	15		
Level 1	**Level 2**	**Level 3**	
1.3 - Customer Domain			
	1.3.3 - Customer Order Management		
		1.3.3.1 - Determine Customer Order Feasibility	5
		1.3.3.2 - Authorize Credit	5
		1.3.3.4 - Complete Customer Order	5
		1.3.3.5 - Issue Customer Orders	5
		1.3.3.6 - Report Customer Order Handling	5
		1.3.3.7 - Close Customer Order	5
		1.3.3.8 - Manage Order Fallout	5
		1.3.3.9 - Customer Order Orchestration	5
1.6 - Business Partner Domain			
	1.6.8 - Business Partner Order Management		
		1.6.8.1 - Select External Business Partner for Business Partner Order	5
		1.6.8.2 - Determine Business Partner Pre- Order Feasibility	5
		1.6.8.3 - Track & Manage Business Partner Orders	5
		1.6.8.4 - Receive & Accept Business Partner Order	5
		1.6.8.5 - Issue Business Partner Order	5
		1.6.8.6 - Report Business Partner Orders	5
		1.6.8.7 - Close Business Partner Order	5

Figure 9- - eTOM Conformance Scores Summary - COM

Business Process Framework – Conformance Result Summary

This Section provides a graphical view of the conformance levels granted to the Level 3 Processes presented in scope for Industries Order Management Release Winter 23. Each Level 3 process was measured using a Business Process Framework (eTOM) conformance score according to the level of Conformance – Full Conformance (Score = 5) or Partial Conformance (Score below 5)
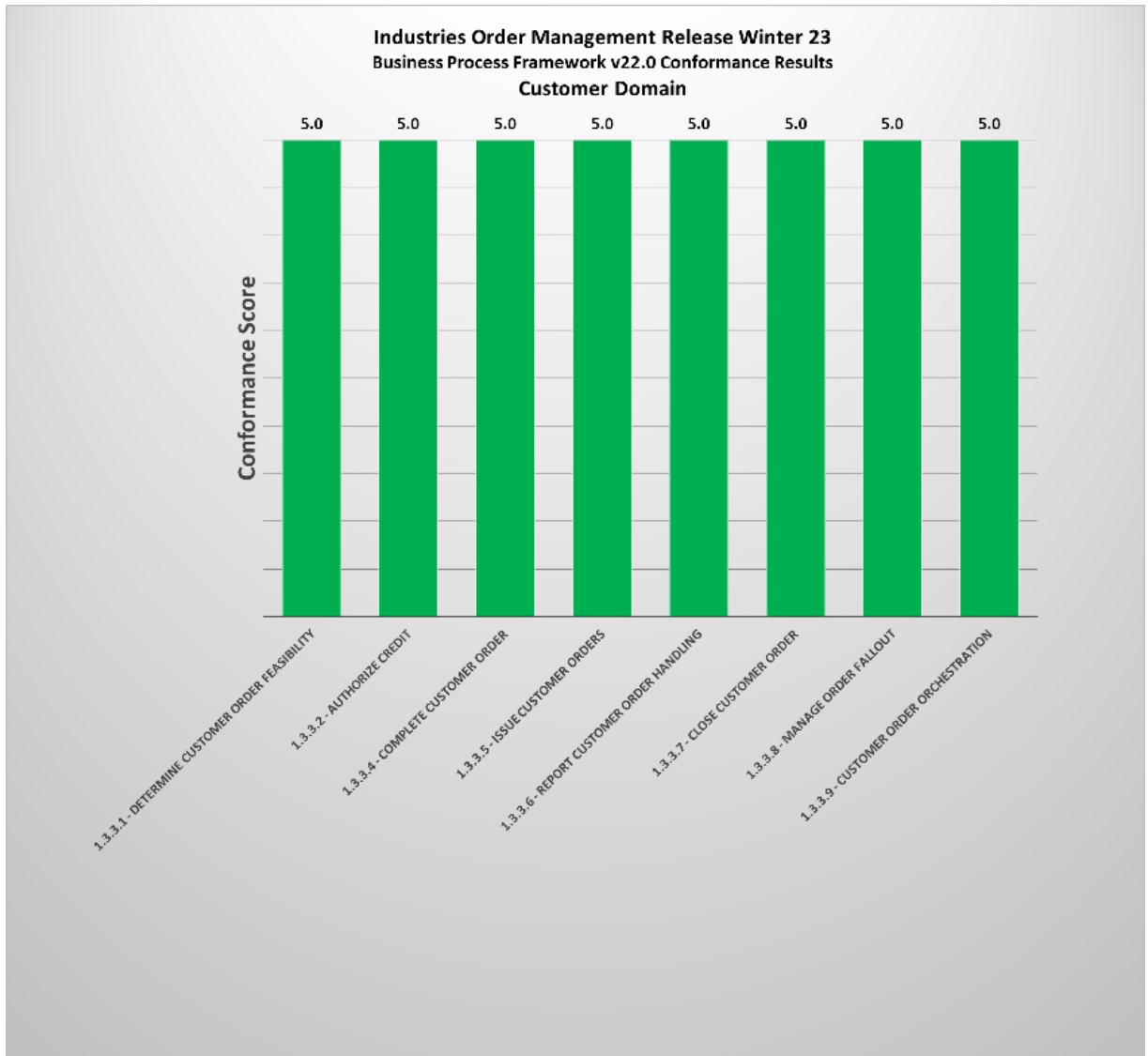
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Figure 10- eTOM – Customer Domain Conformance Scores - COM
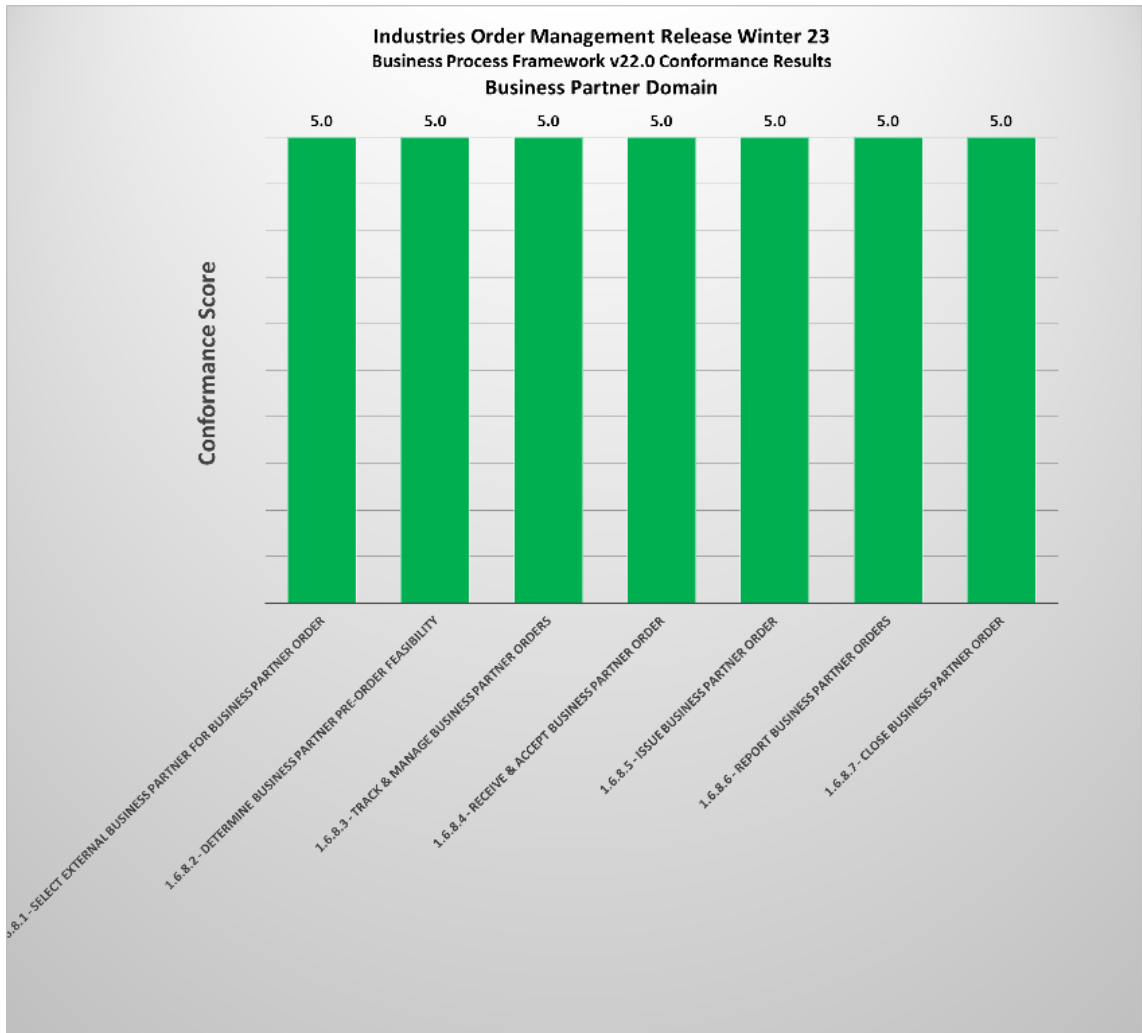
Figure 11- eTOM – Business Partner Domain Conformance Scores - COM

3   Information Framework Assessment Overview

3.1   Mapping Technique Employed

The certification scope defines the list of Information Framework (SID) ABEs (Aggregate Business Entities) for which mapping support is reviewed during the assessment. For each of the ABEs defined in scope for the assessment, the organization undergoing the assessment must map their information model to the core entities and dependent entities and the required and optional attributes for each entity, as defined in the SID model, according to what is supported for the product/solution under assessment.

For a view of the ABEs that were submitted in scope for conformance certification, please refer to scope in previous page.

3.2   Information Frameworx Conformance Result

This Section details the Scores awarded to reflect Conformance of Salesforce COM to the Information Framework components release 22.0.

3.2.1   Information Framework – Scoring Rules

Starting on the 1st of January 2018, one single method has been retained instead of the two previous scoring methods (Maturity + Adoption). The use of two different methods made interpretation and understanding difficult and ambiguous for many of our members, on the ground of such experience, the TM Forum decided to keep only the "Adoption" scoring method and discard the "Maturity" scoring method.

Adoption scoring ensures a good balance between qualitative and quantitative criteria on SID conformance criteria. The adoption scoring method consists of a range of scores from 1 to 10 which makes it intuitive and fair, it is also based on weighted criteria e.g. core element, dependent, required, optional, etc.

This section provides further details about the **Adoption** scoring method.

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3.2.2   Information Framework Adoption Conformance Scoring Methodology

Information Framework Adoption scores are granted based on the detailed scoring guidelines outlined in Table 2 below.

Adoption conformance is based on an accumulative scoring system - i.e. scores are awarded for each element of an ABE to give an overall total Adoption score for the ABE – with elements in this context defined by core & dependent entities and required and optional attributes for both category of entity.

The scores for each element are calibrated according to relative weightings, according to the significance of each element e.g. core entity having higher weighting than dependent entities and required attributes having higher weighting than optional attributes. The relative weightings for each ABE 'element' are indicated in Table 1 - TM Forum Information Framework Adoption Conformance - Scoring Rules Table 2 below.

Information Framework Adoption Conformance Scoring Guidelines	
SID Component	**Weighted Scoring Calculation**
Lowest Level ABE	Equivalent – 1 score point
Core Entity	Equivalent – 2 score points
Core Entity Required Attribute	% equivalent * 2 [Must support min 50% of Required Attributes]
Dependent Entity	% equivalent * 1.5
Dependent Entities – Required Attributes	% equivalent * 1.5
Core Entity – Optional Attributes	% equivalent * 1.2
Dependent Entity – Optional Attributes	% equivalent * 0.8

Adoption Conformance Score Graduation						
Non Conformance [Score = 1 to 3]	Very Low Conformance [3.0 < Score <= 4.0]	Low Conformance [4.0 < Score <= 5.0]	Medium Conformance [5.0 < Score <= 6.0]	High Conformance [6.0 < Score <= 8.0]	Very High Conformance [8.0 < Score < 10.0]	Full Conformance [Score = 10.0]

NOTES:
1. The score values for each SID component are added together to get the overall Adoption Conformance score.
2. If 50% of of the required attributes of Core entities are not supported, scores for following components are not applied as Adoption Conformance requires conformance to 50% of the required attributes of Core entities.
3. Adoption Score versus Maturity Level: Using the scoring category to recognise SID adoption, an assessed ABE for which there is equivalence to 2/3 required core attributes and 8/10 dependent entities would be awarded Maturity Level Score = 2.5 (Very Low Confomance) & Adoption Conformance score = 5.2 (Medium Conformance).

Figure 12- TM Forum Information Framework Adoption Conformance - Scoring Rules

3.2.3   Additional Notes on Information Framework Conformance Adoption scoring:

1. For each level, according to what is required, a value is calculated based on the percentage of entities/attributes supported - as appropriate. This will result in a decimal figure (rounded to one decimal place).

2. Adoption Scoring is based on the progressive scoring schema from the former "Maturity" scoring, however it provides additional flexibility in-so-far as it allows to score all attributes and entities in an assessed ABE. In the former "Maturity" scoring, when not all required attributes of the Core Entity were supported, the Maturity Level score would not progress to the next level, regardless of conformance to other "subordinate" components of the ABE (e.g. dependent entities, optional attributes). "Adoption" scoring fixes this constraint as it provides a weighting mechanism to score all elements supported, regardless of the absence of the core entity or/and required attributes.

3. A **core business entity** is an entity upon which other entities within the ABE are dependent. For example, Service in the Service ABE. A model should strive to attain as high a level of Information Framework (SID) conformance as possible. A core entity is also an entity whose absence in the ABE would make the ABE incomplete.

4. A **dependent entity** is one whose instances are dependent on an instance of a core entity. For example, a ServiceCharacteristic instance within the Service ABE is dependent upon an instance of the Service entity.

5. The score values for each SID component are added together to get the overall Adoption Conformance score.

6. If 50% of the required attributes of Core entities are not supported, scores for following categories are not applied as Adoption Conformance requires conformance to 50% of the required attributes of Core entities.

3.3   Information Framework – Conformance Result Summary

The following sections provide the summary results of the Information Framework Adoption scores granted to the ABEs presented in scope for the assessment of Industries Order Management Release Winter 23.

Each ABE was measured using the Information Framework (SID) conformance scoring guidelines as described in section 3.2.2 above.

3.4 Information Framework – Conformance Results

Industries Order Management Release Winter 23 = 5 ABEs		
Level 1 ABEs		
Customer Domain		
Customer Product Order ABE		10.00
Product Domain		
Product Order ABE		10.00
Common Domain		
Agreement ABE		10.00
Business Interaction ABE		10.00

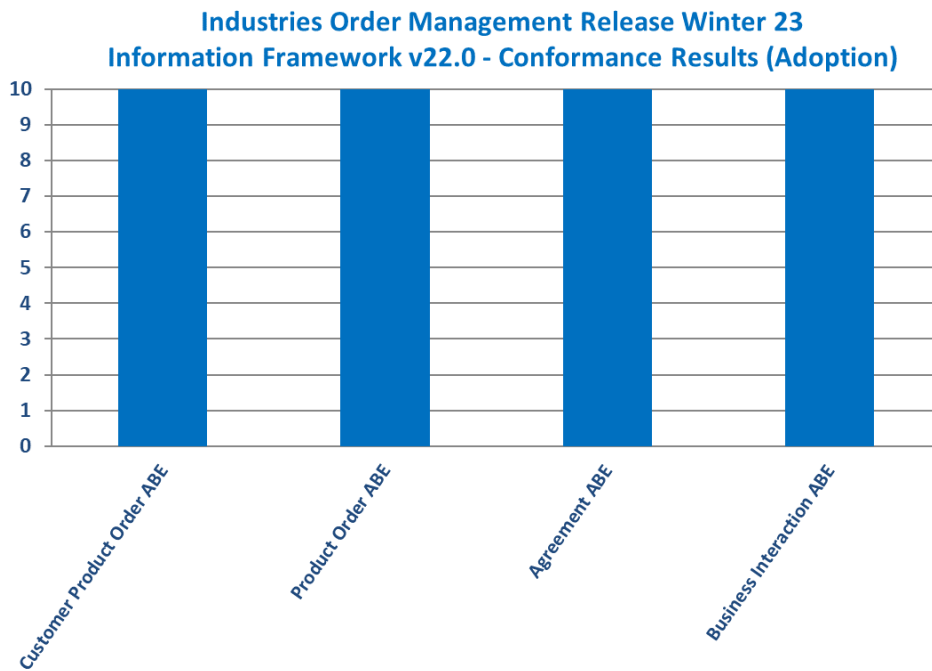**Figure 13- Information Framework: Conformance Scores for Industries Order Management Release Winter 23**

**Industries Order Management Release Winter 23
Information Framework v22.0 - Conformance Results (Adoption)**

Figure 14- Information Framework: Conformance Scores (chart)

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3.5 Conformance Assessment Team

SALESFORCE Conformance Certification Assessment Team			
Salesforce Assessment Team			
Name	Function	Role	Location
Abhi Sur	Senior Director - Product Management, Communications Industry	Program Manager	USA
J.J. Jakubik	VP Architecture, Salesforce Industries	Exec Sponsor	USA
Shawn Henshall	Senior Director Product Management, CME	Industries OM Product Manager	Canada
Kshitij Shivani	Distinguished Solution Engineer	OM Track Lead	Australia
Kaushik Basu	Senior Principal Architect, Industry Cloud Architects	OM Track - Business Analyst	USA
Andre Periera	Disntinguished Solution Engineer	OM Track - Business Analyst	Australia
Ashish Mathur	Senior Program Architect	OM Track - Business Analyst	Australia
Vish Sharma	Senior Success Architect	OM Track - Business Analyst	USA
Nicolás Espino	Senior Principal Success Architect	OM Track - Business Analyst	Mexico
Linfoong Lee	Software Engineering	Principal Data Modeler	USA
Manish	Software Engineering	Senior Data Modeler	India

Figure 15- Salesforce Conformance Certification Assessment Teams