Table of Contents

What is GLOVIA OM? ................................................................. 3
100% Native on the Salesforce Platform ........................................ 3
Seamless Integration with Salesforce .......................................... 4
Customization ........................................................................ 6
Supported Salesforce Editions ...................................................... 7
Standard Platform Features ......................................................... 7
GLOVIA OM Packages .............................................................. 8
Resources .............................................................................. 9
What is GLOVIA OM?

Built on the Salesforce Platform, GLOVIA OM extends control of the sales process — all in one system. From leads management to billing: No more unconnected systems with their double entry costs, no more manual processes with spreadsheets, no more lack of sales visibility.

Whether an order is created from a won opportunity or your customer directly enters via your portal, you have a single consistent visibility of the entire quote > order > fulfillment > billing process.

100% Native on the Salesforce Platform

GLOVIA OM is built entirely using native components available on the Salesforce Platform. Figure 1 illustrates the various components used by the application.

![Native Components Diagram]

Figure 1. Native Components

GLOVIA OM continues to grow overtime as more functionality is added into the product, currently it contains the following number of components:

<table>
<thead>
<tr>
<th>Component</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Custom Objects</td>
<td>236</td>
</tr>
<tr>
<td>Custom Fields</td>
<td>4419</td>
</tr>
<tr>
<td>Apex Classes</td>
<td>771</td>
</tr>
<tr>
<td>Apex Triggers</td>
<td>147</td>
</tr>
<tr>
<td>Visualforce Pages</td>
<td>552</td>
</tr>
<tr>
<td>Custom Tabs</td>
<td>75</td>
</tr>
<tr>
<td>Resources (Reports, Validations, Layouts, Dashboards)</td>
<td>1387</td>
</tr>
<tr>
<td>Workflow</td>
<td>4</td>
</tr>
<tr>
<td>Translations</td>
<td>2</td>
</tr>
</tbody>
</table>
Seamless Integration with Salesforce

GLOVIA OM is seamlessly integrated with Salesforce. It extends Salesforce by handling sales execution processes. Figure 2 below illustrates how GLOVIA OM fits into Salesforce.

![Seamless Integration with Salesforce](image)

Figure 2. Seamless Integration

Because the application is 100% native, it has the same behavior, the same user interface, and the same look and feel as standard Salesforce UI. To achieve seamless integration, the application uses standard Salesforce objects and pages. The table below shows the standard Salesforce objects used within GLOVIA OM:

<table>
<thead>
<tr>
<th>Standard Salesforce Objects used within GLOVIA OM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts</td>
</tr>
<tr>
<td>Products</td>
</tr>
<tr>
<td>Opportunities</td>
</tr>
<tr>
<td>Opportunity Line Items</td>
</tr>
<tr>
<td>Price Books</td>
</tr>
<tr>
<td>Price Book Entries</td>
</tr>
<tr>
<td>Cases</td>
</tr>
<tr>
<td>Contracts</td>
</tr>
<tr>
<td>Assets</td>
</tr>
</tbody>
</table>

Although these standard objects are used within GLOVIA OM, they were not modified or customized. Instead, reference objects were created as extensions to the standard objects. The primary purpose of these reference objects is to store ERP data. The reference objects are as follows:

- Account Reference – extends Account
- Product Reference – extends Product
As an example, Figure 3 shows how the standard Accounts Lookup window is being used when creating an Order.

*Figure 3. Accounts lookup window being used within GLOVIA OM*
Customization

**Layouts** – The majority of the GLOVIA OM screen layouts use the standard Salesforce layouts. As a result it is highly customizable. The screen layouts can be customized the same way Salesforce screen is customized. Custom fields can be added or sections of screens (related lists) can be added or removed, for example.

**Forms** – Forms, such as Sales Order Acknowledgement and others are available in GLOVIA OM. They can be configured to fit the users’ organization. Company logos are configurable and appropriate information, such as company address, are automatically printed on the form. Refer to Figure 4 for an example of a Sales Order Acknowledgment.

*Figure 4. Sample GLOVIA OM Form*
For Enterprise Editions and above, the Visualforce pages can be customized. Layouts can be modified and even additional information can be added to the page. Customizing a form is done by simply creating a copy of the form (which is a Visualforce Page), applying your changes to the new page, and mapping the new page into GLOVIA OM. Figure 5 shows a custom page mapped in GLOVIA OM.

![Document Pages](image)

*Figure 5. Custom Form (c__c_SalesOrderAcknowledgement) in GLOVIA OM*

Note: For customizations that require adding additional information into the form, a custom controller can be created in addition to the custom Visualforce page.

**Supported Salesforce Editions**

GLOVIA OM can only run with the following licenses: **Force.com, Enterprise Edition** and **Unlimited Edition**. This can be purchased through Salesforce or any one of our partner resellers, e.g. FUJITSU, Terrasky, Canon (CIIS) etc…

**Standard Platform Features**

Standard platform features can be leveraged from within GLOVIA OM. Such features include:

- Multi-currency (all editions, optional)
- Roles, Profiles and Page Layouts (EE and above)
- Reports and Dashboards (all editions)
- Workflows and Approvals (EE and above)
- Data Loader (EE and above) – can be used to load data from a third-party system into GLOVIA OM.
- Custom App Development (EE and above)
- Multiple Sandboxes (only UE)
- Integration via Web Services (EE and above) – can be used to integrate GLOVIA OM with external systems, such as accounting systems. GLOVIA OM has Web Services available such as:
  - Invoice Web Service
  - Inventory Transaction History Web Service
**GLOVIA OM Packages**

**Base Package** – The GLOVIA OM base package works with all the supported editions of Salesforce (EE and above).

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Base Package</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
</tbody>
</table>
Resources

- Installation Guide
- Configuration Guide
  
  Contents of this guide:
  - Step 1 – System Customization
  - Step 2 – Initial Setup for GLOVIA OM
  - Step 3 – Code Setup
  - Step 4 – Optional Setup

- Upgrade Guide
- Implementation Guide
  
  Contents of this guide:
  - Implementation Steps
    - Step 1 – Setup your Environment
    - Step 2 – Review the GLOVIA OM Processes
    - Step 3 – Customize GLOVIA OM
    - Step 4 – Train your users
    - Step 5 – Go LIVE
  - Setting up Support Tables
    - Code Maintenance
    - Accounts Maintenance
    - Products Maintenance
    - Inventory Maintenance
    - Custom Settings
    - Mass Data Upload (including Data Loader templates)
  - GLOVIA OM Processes
    - Order Creation
    - Order Fulfillment
    - Inventory Management

- Customization Guide
- Financial Integration Guide
- Posting and T-Accounts Guide
- Kitting Guide
- Multi-Currency Guide
- User Guide