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Seamless Migration of 200+ Million Records to Oracle & Salesforce In Less Than 10 Hours

Insight

A prominent e-signature company struggled to issue refunds, credits, and amendments to subscriptions with Zuora Subscription Billing due to the lack of intuitive and user-friendly invoice management features. They used Excel spreadsheets to identify which customers cancelled their subscriptions, turned their auto-renew off, or removed a product from their subscription.

Forsys in partnership with FloData executed the end-to-end migration from Zuora to Oracle Billing and Revenue Management (BRM), which resulted in standardized and streamlined billing processes, 90% time savings, and seamless migration of more than 200 million records to Oracle Fusion Cloud & Salesforce.

Industry
Software Development

Revenue
$2+ B

Employees
7K+

Headquarters
California, US

Business Challenge

The client experiences problems with Zuora Subscription Billing due to:

01 Unavailability of dashboard configuration caused errors in exported data

02 Continued reliance on Excel spreadsheets to find subscription details

03 Lack of credit memo, and complex syncing process for invoice item adjustment and credit balance adjustment with Salesforce

Transformation Journey

The client hired Forsys for its robust migration expertise and proven partnership with Oracle for migrating from Zuora to Oracle Billing and Revenue Management (BRM). We drafted and executed the migration roadmap based on the broad brief provided by the client within 10 weeks.

The key highlights of the migration journey:

- Defined, designed, analyzed & executed the POC for SFDC Zuora to Cybersource to DBaaS data migration.
- Analyzed and designed the POC for SFDC - DbaaS migration of account and contact data.
- Conducted SFDC customer extraction work (2 Mocks + 1 UAT and final production cutover.
- Examined and designed the automation of customer, subscription and invoice data from the given accounts List, and identified partner accounts using the account field.
- Extracted all the distinct account records identified from original and partner accounts from the account table and migrated them to the Dbaas table.
- Pulled out all the distinct contacts related to account records identified from the AccountContactRelation table.
- Extracted data related to customers, subscriptions, tokens and PDF (2 Mocks + 1 UAT and final production cutover) from Zuora.
- Assessed and created a design to leverage OCI - Vault Service API for getting the key and secret for credit card decryption.
- Built data migration scripts with FloData flows to execute one-time migration.
- Identified data that needed to be cleaned up before migration.
- Executed migration runs to load data.
- Executed post-migration scripts to reconcile data.

Impact

After the go live, the client:

01 **Migrated over 200+M records in less than 10 hours.**

02 **Recorded 90% time savings.**

03 **Automated the flows for every test cycle and major release.**

04 **Reconciled scripts to ensure source and target data match.**

About the Client

The client is an American company that helps organizations connect and automate how they prepare, sign, act on and manage agreements by offering eSignature, the world's #1 way to sign electronically on practically any device, from almost anywhere, at any time.

Solution Components

Oracle DBaaS, Zuora Billing, Oracle Billing and Revenue Management, SFDC, FloData, JIRA