



CONFIGURE, PRICE,
AND QUOTE
CLOUD

Oracle CPQ Cloud-Oracle Sales Cloud Integration through Oracle Integration Cloud Service Implementation Guide

CPQ Cloud 2015 R1, OSC Release 9, and ICS 15.4.3

ORACLE WHITE PAPER | DECEMBER 2015



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Introduction

Integrating Oracle Configure, Price, and Quote Cloud (CPQ Cloud) and Oracle Sales Cloud (OSC) streamlines the entire opportunity-to-quote-to-order process. Transaction data is passed seamlessly between the two applications, ensuring accuracy and allowing OSC users to take advantage of the on-demand configuration, pricing, and quoting capabilities of CPQ Cloud. Oracle Integration Cloud Service (ICS) middleware greatly reduces the time and complexity associated with the implementation and maintenance of a CPQ Cloud-OSC integration.

Scope

This white paper shows how to implement four Transaction-related integrations (Opportunity Import, Upsert Quote, Create Revenue Items, and Delete All Revenue Items) between CPQ Cloud and OSC through ICS.

Supported Use Cases

As of CPQ Cloud 2015 R1, integration with OSC through ICS supports the following use cases:

- » *Import Opportunity*: Imports the OSC opportunity ID when a CPQ Cloud Transaction is created
- » *Upsert Quote*: Creates a quote in OSC using Commerce attribute data from a CPQ Cloud Transaction, or, if a quote already exists in OSC, updates the quote in OSC using the Commerce attribute data from the CPQ Cloud Transaction
- » *Create Revenue Items*: Creates revenue items (lines) on the OSC opportunity for each line on the CPQ Cloud Transaction
- » *Delete All Revenue Items*: Deletes all revenue items (lines) that originated from the CPQ Cloud Transaction off of the OSC opportunity

Audience

This white paper is primarily intended for CPQ Cloud administrators or implementation consultants tasked with implementing or supporting a CPQ Cloud-OSC integration through ICS.

Related Documents

For more information about administering ICS, see [Using Oracle Integration Cloud Service](#). For information related to integration with CPQ Cloud, see the [Configuring Oracle CPQ Cloud Properties](#) section of the ICS user guide.

For more information on CPQ Cloud-OSC integration in general, see [Integrating Oracle Sales Cloud with Oracle CPQ Cloud](#) on My Oracle Support.

Future Integrations and Enhancements

Several more CPQ Cloud-OSC integrations through ICS are on the CPQ Cloud product road map, including:

- » Accounts/Contacts
- » Parts

Additionally, enhancements will be made to make the CPQ Cloud-ICS integrations more robust, including:

- » A central Web Services repository for all CPQ Cloud Web Services used in ICS integrations
- » Support for a CPQ-OSC REST adaptor in ICS, as well as all CPQ Cloud REST Web Services in ICS integrations

Feedback

We welcome your comments and suggestions to help improve this document. Please send your feedback to cpqcloud_documentation_us_grp@oracle.com.

Prerequisites

This integration requires the following:

- » An “OSC Reference Application” CPQ Cloud site on 2015 R1 or later
- » An OSC site on Release 9 or later that has Product Information Management (PIM) integration
- » An ICS site on 15.4.3 or later

Integration Overview

When implementing this integration with the CPQ Cloud-OSC Integration Package (as is covered in this document), CPQ Cloud will be the source site in the integration and OSC will be the target site. Integrations are initiated within CPQ Cloud when a Transaction is created or opened, and when the Save, Update Opportunity, Cancel Transaction, or Delete Transaction actions are invoked on a CPQ Cloud Transaction.

Table 1 describes when each intention is invoked. A checkmark indicates that the integration is invoked when the literal action or CPQ Cloud action is invoked.

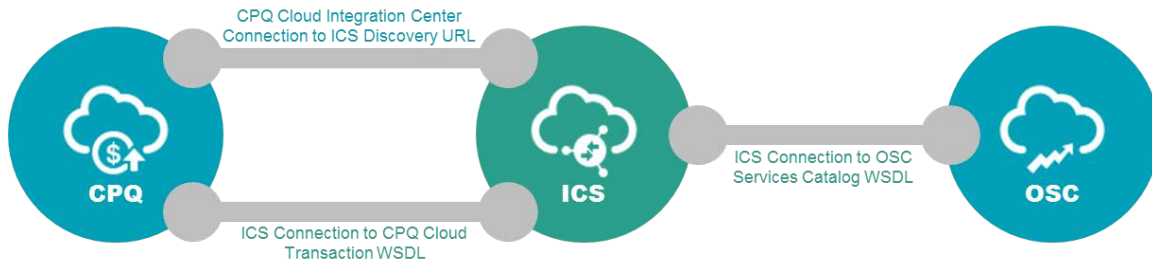
	Transaction Created or Opened	Save Action Invoked	Update Opportunity Action Invoked	Cancel Transaction Action Invoked	Delete Transaction Action Invoked
Import Opportunity	✓				
Upsert Quote		✓	✓	✓	✓
Create Revenue Items			✓		
Delete All Revenue Items			✓		✓

Table 1

In order for data to be sent between systems, connections and integrations must be established in CPQ Cloud and ICS. Connections open the lines of communication between the systems, and integrations specify the Web Service requests and responses that will be sent among the three systems.

Connections

Three connections must be established, two between CPQ Cloud and ICS, and one between ICS and OSC Web Services. These connections enable the three systems to pass Web Service calls between each other, and to access the Transaction and Opportunity data needed to enable the integration. See Graphic 1 for details on the connections between each system.



Graphic 1

Integrations

CPQ Cloud and OSC are connected in this integration through CPQ Cloud integrations, ICS integrations, and OSC Web Services. CPQ Cloud integrations are linked to ICS integrations, which are in turn linked to OSC Web Services. See Graphic 2 for details on the integrations between each system.



Graphic 2

ICS Setup

Installing the CPQ Cloud-OSC Integration Package in ICS will create connections to CPQ Cloud and OSC in ICS, as well as four integrations between CPQ Cloud and OSC (Opportunity Import, Quote Upsert, Create All Revenue Items, and Delete All Revenue Items) in ICS that already have default field mappings in place.

The connections to CPQ Cloud and OSC must be configured before the four integrations can be activated.

The CPQ Cloud connection must be configured with the CPQ Cloud Transaction WSDL URL so that ICS can access CPQ Cloud Transaction data, and with CPQ Cloud login credentials so that ICS can perform integration actions in CPQ Cloud. The OSC connection must be configured with the OSC Services Catalog WSDL URL so that ICS can access OSC Web Services, and with OSC login credentials so that ICS can access perform integration actions in OSC.

Once connections have been configured, the four CPQ Cloud-OSC integrations in ICS can be activated to complete the ICS setup.



ICS Setup Steps

1. [Installing the CPQ Cloud-OSC Integration Package](#)
 - a. [Downloading the Package](#)
 - b. [Importing the Package](#)
2. [Configuring the CPQ Cloud Connection](#)
 - a. [Accessing the CPQ Cloud Connection](#)
 - b. [Building the CPQ Cloud Transaction WSDL URL](#)
 - c. [Adding the CPQ Cloud Transaction WSDL URL to the CPQ Cloud Connection](#)
 - d. [Adding CPQ Cloud Credentials to the CPQ Cloud Connection](#)
3. [Configuring the OSC Connection](#)
 - a. [Accessing the OSC Connection](#)
 - b. [Building the OSC Services Catalog WSDL to the OSC Connection](#)
 - c. [Adding the OSC Services Catalog WSDL URL to the OSC Connection](#)
 - d. [Adding OSC Credentials to the OSC Connection](#)
4. [Activating the CPQ Cloud-OSC Integrations](#)

Installing the CPQ Cloud-OSC Integration Package

Installing the CPQ Cloud-OSC Integration Package in ICS will create connections to CPQ Cloud and OSC in ICS, as well as four integrations between CPQ Cloud and OSC (Opportunity Import, Quote Upsert, Create All Revenue Items, and Delete All Revenue Items) in ICS that already have default field mappings in place. These pre-built integrations mimic the corresponding point-to-point integrations between CPQ Cloud and OSC.

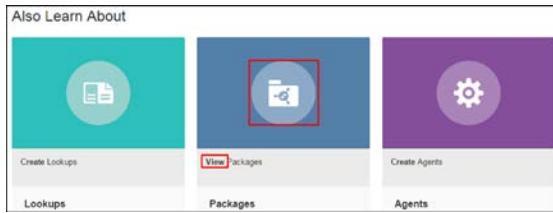
Downloading the Package

1. Open the [ICS Implementation Guide](#) page on My Oracle Support.
2. Download and save the package .par file from the page to somewhere you can access it to upload it to ICS.

Importing the Package

1. Log in to ICS as an admin user.

2. On the welcome page, click the **View** link above “Packages,” or click the Packages icon.



3. Click **Import Package**.

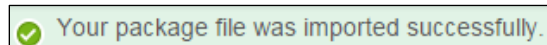
The Import Package File dialog box appears.

4. Click **Choose File**.

A window will open with your file directory.

5. Navigate within your file directory to where the package's .par file is saved and select the file.
6. With the package selected, click **Open** (this button may have a different name depending on which browser you are using).
7. Click **Import**.

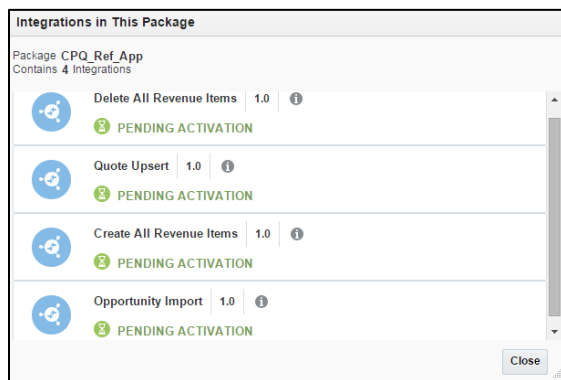
If the import was successful, a “Your package file was imported successfully” note will appear at top of the page.



The package will now appear in the Packages list as “CPQ_Ref_App.”



If you click **CPQ_Ref_App** to view the package, you will see that the four integrations created by the package (Opportunity Import, Quote Upsert, Create All Revenue Items, and Delete All Revenue Items) are pending activation.



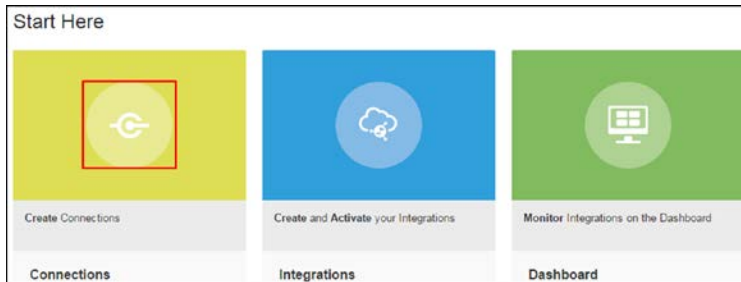
Configuring the CPQ Cloud Connection

A connection to CPQ Cloud was created in ICS when the CPQ Cloud-OSC Integration Package was installed. This connection must be configured with the CPQ Cloud Transaction WSDL URL and CPQ Cloud login credentials so that ICS can access CPQ Cloud Transaction data, perform integration actions in CPQ Cloud, and so that the integrations can be activated in ICS.

Accessing the CPQ Cloud Connection

1. Log in to ICS as an admin user.

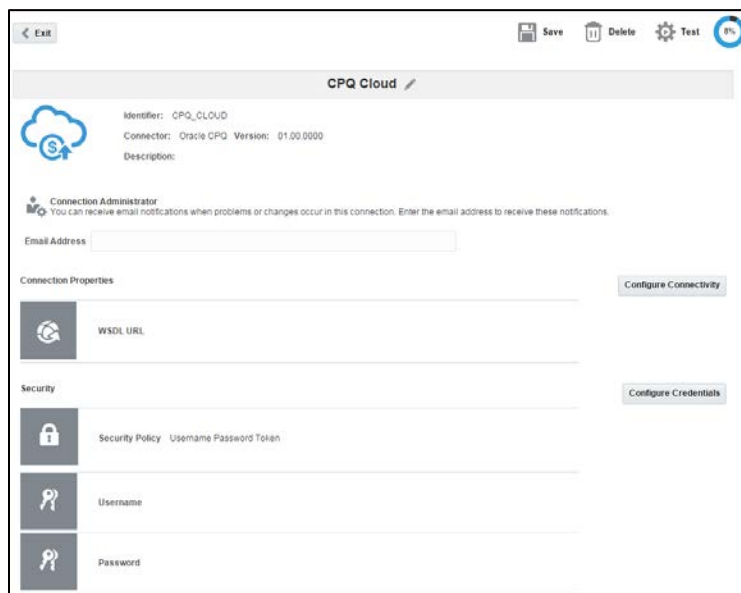
2. On the welcome page, click the **Connections** icon.



3. Click the **CPQ Cloud** connection to open it.



The connection administration page appears.



Building the CPQ Cloud Transaction WSDL URL

ICS uses the CPQ Cloud Transaction WSDL to understand the valid data and operations that CPQ Cloud provides. The CPQ Cloud Transaction WSDL URL can be created using the following format:

URL Format: `https://<siteURL>/v2_0/receiver/commerce/oraclecpqo?WSDL`

Parameter: `<siteURL>` = The base URL of the CPQ Cloud site that will integrate with ICS

1. Add the base URL of the CPQ Cloud site to the CPQ Cloud Transaction WSDL URL format.
2. Open the URL you built in a web browser. If the URL is correct, a page of WSDL should appear.

Adding the CPQ Cloud Transaction WSDL URL to the CPQ Cloud Connection

1. Go back to the browser window that has the CPQ Cloud connection administration page open in ICS.
2. Click **Configure Connectivity**.
The Connection Properties dialog box appears.
3. Paste the Transaction WSDL URL into the WSDL URL field.
4. Click **OK**.
5. Click **Save** on the connection administration page. A Connection in Use dialog box appears.
6. Click **Yes** on the Connection in Use dialog box.

Adding CPQ Cloud Credentials to the CPQ Cloud Connection

Valid CPQ Cloud credentials must be entered into the ICS connection with CPQ Cloud so that ICS can perform integration actions in CPQ Cloud.

1. On the CPQ Cloud connection administration page in ICS, click **Configure Credentials**.
The Credentials dialog box appears.
2. In the Username, Password, and Confirm Password fields, enter the credentials of a CPQ Cloud FullAccess user.
3. Click **OK**.
4. Click **Test** in top-right corner of the connection administration page to test the connection to CPQ Cloud. If the test is successful, a “The connection test was successful!” note will appear at the top of the page.



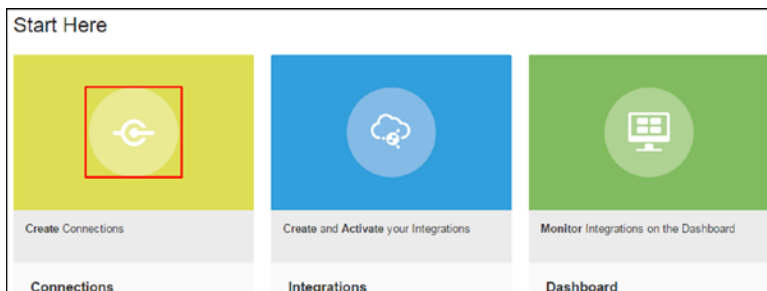
5. Click **Save** on the connection administration page. A Connection in Use dialog box appears.
6. Click **Yes** on the Connection in Use dialog box.

Configuring the OSC Connection

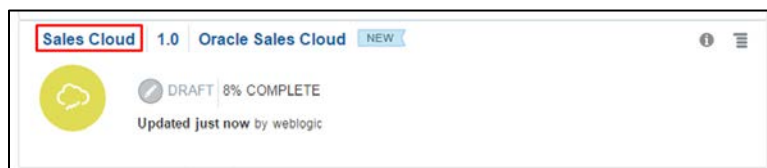
A connection to OSC was created in ICS when the CPQ Cloud-OSC Integration Package was installed. This connection must be configured with the OSC Services Catalog WSDL URL and OSC login credentials so that ICS can access OSC Web Services, perform integration actions in OSC, and so that the integrations can be activated in ICS.

Accessing the OSC Connection

1. Log in to ICS as an admin user.
2. On the welcome page, click the **Connections** icon.



3. Click the **Sales Cloud** connection to open it.



The connection administration page appears.

The screenshot displays the 'Sales Cloud' connection administration interface. At the top, there are tabs for 'Exit', 'Save', 'Delete', 'Test', and a progress indicator at 13%. The main section is titled 'Sales Cloud' and includes a cloud icon. Below this, the 'Identifier' is 'SALES_CLOUD', the 'Connector' is 'Oracle Sales Cloud', and the 'Version' is '01.00.0000'. A 'Description' field is also present. The 'Connection Administrator' section allows users to receive email notifications by entering an 'Email Address'. The 'Connection Properties' section contains two fields: 'OSC Services Catalog WSDL URL' and 'OSC Events Catalog URL (optional)'. The 'Security' section includes a 'Security Policy' dropdown set to 'Username Password Token', and fields for 'Username' and 'Password'. Buttons for 'Configure Connectivity' and 'Configure Credentials' are located on the right side of the respective sections.

Building the OSC Services Catalog WSDL to the OSC Connection

ICS uses the OSC Services Catalog WSDL URL to give ICS access to existing OSC Web Services opportunityService and salesOrderService. The OSC Services Catalog WSDL URL can be created using the following format:

URL Format: `https://<siteURL>/fndAppCoreServices/ServiceCatalogService?wsdl`

Parameter: `<siteURL>` = The base URL of the OSC site that will integrate with ICS

Once you have built the OSC Services Catalog WSDL URL, optionally open the URL in a web browser. If the URL is correct, a page of WSDL should appear.

Adding the OSC Services Catalog WSDL URL to the OSC Connection

1. Go back to the browser window that has the OSC connection administration page open in ICS.
2. Within the OSC connection, click **Configure Connectivity**.
The Connection Properties dialog box appears.
3. Paste the OSC Services Catalog WSDL URL into the OSC Services Catalog WSDL URL field.
4. Click **OK**.
5. Click **Save** on the connection administration page. A Connection in Use dialog box appears.
6. Click **Yes** on the Connection in Use dialog box.

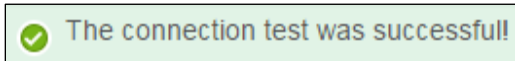
Adding OSC Credentials to the OSC Connection

Valid OSC credentials must be entered into the ICS connection with OSC so that ICS can perform integration actions in OSC.

1. On the OSC connection administration page in ICS, click **Configure Credentials**.

The Credentials dialog box appears.

2. In the Username, Password, and Confirm Password fields, enter the credentials of an OSC user with Sales Administrator and Product Information Management Administrator access rights.
3. Click **OK**.
4. Click **Test** in top-right corner of the connection administration page to test the connection to CPQ Cloud. If the test is successful, a “The connection test was successful!” note will appear at the top of the page.

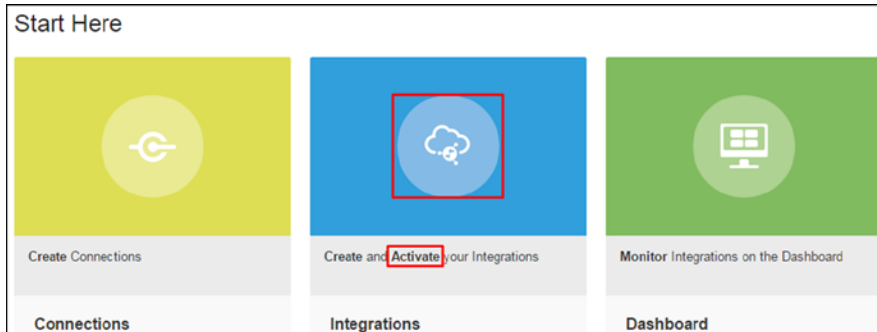


5. Click **Save** on the connection administration page. A Connection in Use dialog box appears.
6. Click **Yes** on the Connection in Use dialog box.

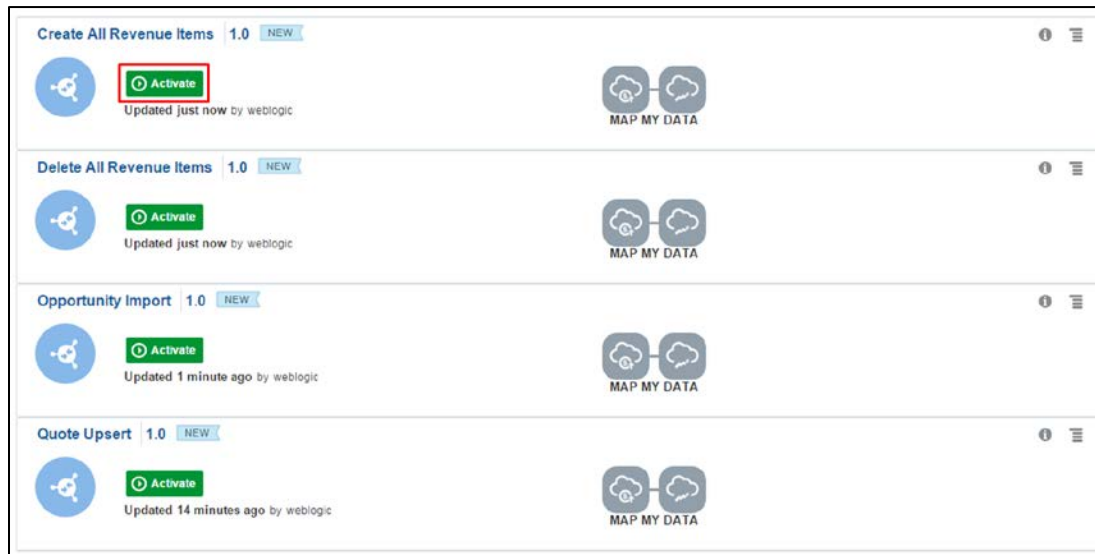
Activating the CPQ Cloud-OSC Integrations

Four CPQ Cloud-OSC integrations (Opportunity Import, Quote Upsert, Create All Revenue Items, and Delete All Revenue Items) were created in ICS when the CPQ Cloud-OSC Integration Package was installed. Now that the connections to CPQ Cloud and OSC have been configured, these integrations can be activated.

7. Log in to ICS as an admin user.
8. On the welcome page, click the **Activate** link above “Integrations,” or click the Integrations icon.



9. Click the **Activate** button for the Create All Revenue Items integration.



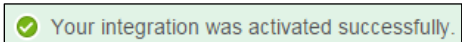
A Confirmation dialog box appears.

10. Optionally select the checkbox for “Enable detailed tracing.” When “Enable detailed tracing” is selected, detailed logging information about messages processed by this integration flow at runtime is collected. This can aid in troubleshooting issues, but may impact performance. To access these logs in ICS, navigate to Home > Monitor > Activity Stream > Download Logs.

Note: To disable detailed tracing, you must deactivate the integration and then reactivate it without detailed tracing enabled.

11. Click **Activate**.

If the activation is successful, a “Your integration was activated successfully” note will appear at the top of the page.



12. Repeat steps 3-5 for the Delete All Revenue Items, Opportunity Import, and Quote Upsert integrations.

THE ICS PORTION OF THE IMPLEMENTATION IS COMPLETE



CPQ Cloud Setup

Now that ICS has established connections to CPQ Cloud and OSC, and the CPQ Cloud-OSC Integration Package has created the necessary integrations within ICS, the CPQ Cloud setup can begin.

First, a connection must be made within CPQ Cloud to ICS so that CPQ Cloud can access ICS and send it the appropriate Web Service request when an integration is fired. This connection will be established in the Integration Center.

Next, integrations must be created within the Oracle Quote to Order Commerce Process in CPQ Cloud, and these integrations will be linked to the corresponding integrations in ICS. These integrations will be tied to either the Oracle Quote to Order Commerce Process or to Commerce actions, so that each integration will be fired either when a Transaction is created or when a specific Commerce action is invoked.

Finally, parts integration must be enabled and the Opportunity Mapping ID must be added to the Main Document of the Oracle Quote to Order Commerce Process so that each integration will be able to function.



CPQ Cloud Setup Steps

1. [Creating a Connection to ICS](#)
2. [Adding Integrations to ICS in the Commerce Process](#)
3. [Associating Integrations with the Commerce Process and Actions](#)
 - a. [Associating the Commerce Process](#)
 - b. [Associating the Save Action](#)
 - c. [Associating the Update Opportunity Action](#)
 - d. [Associating the Cancel Transaction Action](#)
 - e. [Associating the Delete Transaction Action](#)
 - f. [Deploying the Commerce Process](#)
4. [Enabling Parts Integration](#)
 - a. [Establishing a Parts Master](#)
 - b. [Performing and Scheduling Parts Integrations](#)

Creating a Connection to ICS

A connection must be made from the CPQ Cloud Integration Center to the ICS site to enable CPQ Cloud to communicate with ICS.

1. Log in to CPQ Cloud as a FullAccess user.
2. Click **Admin** to go to the Admin Home Page.
3. Click **Integration Center** under Integration Platform.
The **Integration Center** page appears.
4. Click **Create Integration**.
5. Select **Integration Cloud Service** from the **Type** drop-down menu.
6. Enter a Name and Variable Name for the Integration. These names do not appear anywhere else on the admin side of the application, so they can follow any naming convention.
7. Enter the ICS Discovery URL into the Discovery URL field using the formula below, where [URL] is the base url of the ICS site (up to and including the ".com"):

https://[URL]/icsapis/v1/integrations

8. In the Username and Password fields, enter a username and password for an admin user of the ICS site you are integrating with.
9. Click the **Test** button to confirm that the Discovery URL and ICS credentials are valid and a connection can be made to the ICS site. If the test succeeds, "Test Connection Passed!" will appear next to the Test button. If the test fails, a failure message will be shown next to the Test button. Make any necessary changes before testing again.
10. After the test succeeds, select the **Enable Integration** checkbox.
11. Click **Save** to save the connection details.

Integration Center Notes

- » The Enable Integration checkbox is disabled until the Discovery URL, Username, and Password have been entered.
- » A valid, enabled and saved integration shows the Discover URL, Username, and Password fields as read-only.
- » If a user disables a previously enabled integration by unselecting the Enable Integration checkbox, a warning will appear saying that all existing integrations based on the integration type will also be disabled. When the user clicks Save, the warning disappears, the integrations are disabled, and the Discover URL, Username, and Password fields return to being editable. Any Commerce Process integrations that were tied to the integration that was disabled will no longer execute as they did before—these integrations are effectively disabled as well. Reselecting Enable Integration will bring the integrations back online, unless changes have been made to the connection or the integrations to make them invalid.
- » If, when testing or saving the connection, an error occurs and says that the base URL of the ICS site is not a valid domain, open a ticket on [My Oracle Support](#) to add the URL as a valid domain within the system.

Adding Integrations to ICS in the Commerce Process

Having created a connection to ICS through the Integration Center, you can now create integrations to ICS within the Oracle Quote to Order Commerce Process that match the four integrations created by the CPQ Cloud-OSC Integration Package in ICS. The names of the integrations in CPQ Cloud and the integrations in ICS may vary slightly. See Table 2 for guidance.

CPQ Cloud Integration Name	ICS Integration Name
Import Opportunity	Opportunity Import
Upsert Quote	Quote Upsert
Create Revenue Items	Create All Revenue Items
Delete All Revenue Items	Delete All Revenue Items

Table 2

These integrations will be triggered by the Oracle Quote to Order Commerce Process or by Commerce actions, and will determine what Web Service message is sent to ICS when an integration is fired, based on the integration in ICS that it is tied to.

1. Log in to CPQ Cloud as a FullAccess user.
2. Click **Admin** to go to the Admin Home Page.
3. Click **Process Definition** under Commerce and Documents.
4. For the Oracle Quote to Order Commerce Process, select **Integrations** in the Navigation drop-down menu and then click **List**.
The **Integrations** page appears.
5. Click **Add**.

- Select the radio button for **Integration Cloud Service**.

Select Integration Types	
Select	Type
<input type="radio"/>	Export (SOAP Generator)
<input type="radio"/>	Import (Query Generator and Result Parser)
<input checked="" type="radio"/>	Integration Cloud Service

- Click **Next**.
The **Edit Integration** page appears.
- Enter `Import Opportunity` in the Name field.
- Place your cursor in the Variable Name field to auto-populate the field with `importOpportunity`.
- Optionally add a Description of the integration.
- Select **Import** for Action. This option is only used for labelling purposes and will not have any effect on the integration.
- Select **Opportunity Import** from the Services drop-down. The name of this service matches the name of the integration in ICS.

Action	<input checked="" type="radio"/> Import <input type="radio"/> Export
*Services:	<div> <input type="text" value="Opportunity Import"/> ▼ </div> <div> Quote Upsert Opportunity Import Delete All Revenue Items Create All Revenue Items </div>

- Click **Add**.
- Click **Back** to return to the Integrations list.
- Repeat steps 5-14 for the Upsert Quote, Create Revenue Items, and Delete All Revenue Items integrations. Use Table 3 below for the integration-specific values that must be used:

	Name	Variable Name	Action	Services
Upsert Quote	Upsert Quote	upsertQuote	Export	Quote Upsert
Create Revenue Items	Create Revenue Items	createRevenueItems	Export	Create All Revenue Items
Delete All Revenue Items	Delete All Revenue Items	deleteAllRevenueItems	Export	Delete All Revenue Items

Table 3

Associating Integrations with the Commerce Process and Actions

In order for integrations to be triggered in CPQ Cloud, they must be tied to (associated with) something. The descriptions below provide a simple integration flow for each integration for your reference. Step by step instructions for associating integrations with the Commerce Process and actions are after these descriptions.

Import Opportunity – *Associated with the Commerce Process*

Since the Import Opportunity integration is tied to the Oracle Quote to Order Commerce Process, whenever a Transaction is created or opened the Import Opportunity integration will fire and the Opportunity ID from OSC will be mapped to the CPQ Cloud Transaction.

Delete All Revenue Items – *Associated with the Update Opportunity and Delete Transaction Actions*

When the Update Opportunity action is invoked, all revenue items that originated from the CPQ Cloud Transaction (if any) will be deleted from the OSC opportunity. This clears the way for new or updated revenue items on the Transaction to be added to the opportunity via the Create Revenue Items integration.

When the Delete Transaction action is invoked, all revenue items that originated from the CPQ Cloud Transaction (if any) will be deleted from the OSC opportunity.

Create Revenue Items – *Associated with the Update Opportunity Action*

When the Update Opportunity action is invoked, all lines on the CPQ Cloud Transaction will be created as revenue items on the OSC opportunity. Revenue items are deleted and then recreated each time the Update Opportunity action is invoked to account for any changes to the revenue items in CPQ Cloud.

Upsert Quote – *Associated with the Save, Update Opportunity, Cancel Transaction, and Delete Transaction Actions*

If a quote does not exist in OSC for a CPQ Cloud Transaction, when a sales user invokes the Save or Update Opportunity action on a Transaction, a quote will be created in OSC using the current Transaction data, with relevant attribute values being mapped from the CPQ Cloud Transaction to the OSC quote.

If a quote already exists in OSC for the CPQ Cloud Transaction, whenever a sales user invokes the Save, Update Opportunity, Cancel Transaction, or Delete Transaction action on a Transaction, the quote will be updated in OSC using the current Transaction data, with relevant attribute values being mapped from the CPQ Cloud Transaction to the OSC quote.

Associating the Commerce Process

1. Click **Admin** to go to the Admin Home Page.
2. Click **Process Definition** under Commerce and Documents.
3. Click **Oracle Quote to Order** to open the Commerce Process.
4. Click the **Integration** tab.
5. Select **Import Opportunity** in the Integration List.
6. Click the **Add Integration** button (➤) to move the integration to the Selected Integration list.
7. Click **Update** to save the Commerce Process.

Associating the Save Action

1. Click **Admin** to go to the Admin Home Page.
2. Click **Process Definition** under Commerce and Documents.
3. Click **List** for the Oracle Quote to Order Commerce Process.
4. For the Transaction level, select **Actions** from the Navigation drop-down and then click **List**.
5. Click the name of the **Save** action in the list to open the action.
6. Click the **Integration** tab.
7. Select **Upsert Quote** in the Integration List.

8. Click the **Add Integration** button (➤) to move the integration to the Selected Integration list.
9. Click **Update** to save the action.

Associating the Update Opportunity Action

1. Click **Admin** to go to the Admin Home Page.
2. Click **Process Definition** under Commerce and Documents.
3. Click **List** for the Oracle Quote to Order Commerce Process.
4. For the Transaction level, select **Actions** from the Navigation drop-down and then click **List**.
5. Click the name of the **Update Opportunity** action in the list to open the action.
6. Click the **Integration** tab.
7. Select **Delete All Revenue Items** in the Integration List.
8. Click the **Add Integration** button (➤) to move the integration to the Selected Integration list.
9. Select **Create Revenue Items** in the Integration List.
10. Click the **Add Integration** button (➤) to move the integration to the Selected Integration list.
11. Select **Upsert Quote** in the Integration List.
12. Click the **Add Integration** button (➤) to move the integration to the Selected Integration list.

Important: Ensure that Selected Integrations list is ordered as follows: Apply Modify Functions, Delete All Revenue Items, Create Revenue Items, Upsert Quote. If any integrations are out of order, use the arrow buttons to correct the order of the selected integrations.

13. Click **Update** to save the action.

Associating the Cancel Transaction Action

1. Click **Admin** to go to the Admin Home Page.
2. Click **Process Definition** under Commerce and Documents.
3. Click **List** for the Oracle Quote to Order Commerce Process.
4. For the Transaction level, select **Actions** from the Navigation drop-down and then click **List**.
5. Click the name of the **Cancel Transaction** action in the list to open the action.
6. Click the **Integration** tab.
7. Select **Upsert Quote** in the Integration List.
8. Click the **Add Integration** button (➤) to move the integration to the Selected Integration list.
9. Click **Update** to save the action.

Associating the Delete Transaction Action

1. Click **Admin** to go to the Admin Home Page.
2. Click **Process Definition** under Commerce and Documents.
3. Click **List** for the Oracle Quote to Order Commerce Process.
4. For the Transaction level, select **Actions** from the Navigation drop-down and then click **List**.
5. Click the name of the **Delete Transaction** action in the list to open the action.
6. Click the **Integration** tab.
7. Select **Delete All Revenue Items** in the Integration List.
8. Click the **Add Integration** button (➤) to move the integration to the Selected Integration list.
9. Select **Upsert Quote** in the Integration List.
10. Click the **Add Integration** button (➤) to move the integration to the Selected Integration list.

Important: Ensure that Selected Integrations list is ordered as follows: Apply Modify Functions, Delete All Revenue Items, Upsert Quote. If any integrations are out of order, use the arrow buttons to correct the order of the selected integrations.

11. Click **Update** to save the action.

Deploying the Commerce Process

1. Click **Admin** to go to the Admin Home Page.
2. Click **Process Definition** under Commerce and Documents.
3. For the Oracle Quote to Order Commerce Process, select **Deployment Center** in the Navigation column and then click **List**.
4. Select **Deploy** for Event Type.
5. Click **Add Event**.

Enabling Parts Integration

Parts integration with OSC must be configured in CPQ Cloud in order for the Create Revenue Items and Delete Revenue Items integrations to function.

Establishing a Parts Master

Before parts integration can be enabled, a Parts Master must be established. Either CPQ Cloud or OSC can be the Parts Master, and will be the application where parts are maintained. Parts integration will sync any changes made to part on the Parts Master system to the other partner system. If you are not sure which system should be the Parts Master, contact your Customer Success Manager.

You can view which system is currently the Parts Master in CPQ Cloud:

1. Log in to CPQ Cloud as a FullAccess user.
2. Click **Admin** to go to the Admin Home Page.
3. Click **Parts** under Products.
The Parts Search for Admin page appears.
4. The system listed under **Item Master** is currently the Parts Master ("BigMachines" means that CPQ Cloud is the Parts Master).



Note: If there is not an Item Master section on the Parts Search for Admin page, open a ticket on [My Oracle Support](#) to enable parts integration.

If you need to change the Parts Master, open a ticket on [My Oracle Support](#).

Performing and Scheduling Parts Integrations

Parts integration must have been run at least once between CPQ Cloud and OSC before the Create Revenue Items and Delete All Revenue Items integrations will function. Keep this in mind if you are scheduling a parts integration for a later date.

Note: Parts integration must be enabled in OSC before running a parts integration can be successful. See the [Enabling Parts Integration](#) section for more information.

1. Log in to CPQ Cloud as a FullAccess user.
2. Click **Admin** to go to the Admin Home Page.
3. Click **Parts** under Products.
The Parts Search for Admin page appears.
4. Click the **Integration** button.
5. Select the checkbox for the **Export/Import Parts** integration (the name of this integration will vary based on if CPQ Cloud or OSC is the Parts Master).

List Integrations				Item Master: BigMachines	
Select	Name	ID Field	Delta	Description	Date Last Modified Last Action Log
<input checked="" type="checkbox"/>	Export Parts	_partner_part_id	<input type="checkbox"/>		12/17/2014 7:17 PM log

[Schedule](#) [Export](#) [Back](#)

6. Click the **Export/Import** button (the name of this button will vary based on if CPQ Cloud or OSC is the Parts Master) to perform a one-time integration, or click the **Schedule** button to schedule a one-time integration or recurring integrations.
7. If you choose to schedule one or more integrations, the **New schedule details for job Export/Import** dialog box appears.

[Add Schedule](#) [Close](#)

New schedule details for job Export

Schedule Type	Day/Frequency	Hours	Minutes
Monthly ▼	1 ▼	0 ▼	0 ▼

Start and End Date

☐ Start Date MM/dd/yyyy h:mm am

☐ End Date MM/dd/yyyy h:mm am

Export - Type for: Parts

☒ Delta -- only export parts that have been updated.

☐ All Parts -- Perform action 'export' for every part.

Details

Export - Last Date: never

Export - Last Date all Parts that have been updated or created since the last export

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[Add Schedule](#) [Close](#)

8. Choose a **Schedule Type** and the corresponding frequency.
 - » **Monthly** (choose which day of the month and the time of the integration)
 - » **Weekly** (choose which day of the week and the time of the integration)
 - » **Daily** (choose the time of the integration)
 - » **Hourly** (choose an interval of 1-23 hours)
 - » **On Demand** (choose the date and time of a one-time integration)
9. Optionally add start and end dates for a recurring integration.
10. Select either **All Parts** or **Delta** depending on if all parts should always be integrated, or only parts that have been modified since the last integration, respectively.
11. When you are done with scheduling details, click **Add Schedule**.

Adding the Opportunity Mapping ID to the Main Document

1. Log in to CPQ Cloud as a FullAccess user.
2. Click **Admin** to go to the Admin Home Page.
3. Click **Process Definition** under Commerce and Documents.
4. Click **List** for the Oracle Quote to Order Commerce Process.
5. Click **Transaction** to open the main document.
6. Enter `transaction.opportunityID_t` in the **Opportunity Id Mapping** field.
7. Click **Update**.
8. Deploy the Commerce Process.
 - a. Click **Admin** to go to the Admin Home Page.
 - b. Click **Process Definition** under Commerce and Documents.
 - c. For the Oracle Quote to Order Commerce Process, select **Deployment Center** in the Navigation column and then click **List**.
 - d. Select **Deploy** for Event Type.
 - e. Click **Add Event**.

THE CPQ CLOUD PORTION OF THE IMPLEMENTATION IS COMPLETE



OSC Setup

The connection and the integration between ICS and OSC have already been established within the ICS setup, and the field mappings between CPQ Cloud and OSC are already in place.

In order to be able to launch CPQ Cloud in an embedded iframe within OSC when a Transaction is created or opened, and in order for a user to be able to return to the OSC opportunity from a CPQ Cloud Transaction, punch-in URLs must be configured in the Fusion Setup Manager of OSC.



Configuring Punch-in URLs in the Fusion Setup Manager

Complete the steps in the “Setup the Point-to-Point Integration of Quotes and Sales Orders in Fusion Setup Manager” section of the [Integrating Oracle Sales Cloud with Oracle CPQ Cloud](#) white paper to set up the punch-in URLs.

Note: It is not required to complete steps for the “Copy,” “New Version,” and “Get Proposal” integrations.

Enabling Parts Integration

Parts integration with CPQ Cloud must be configured in OSC in order for the Create Revenue Items and Delete Revenue Items integrations to function. Contact your OSC point-of-contact for more information.

THE OSC PORTION OF THE IMPLEMENTATION IS COMPLETE



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Oracle is committed to developing practices and products that help protect the environment.