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CONFIGURE, PRICE, AND QUOTE CLOUD

# Oracle CPQ Cloud
# Salesforce Commerce Integration Managed Package Implementation Guide

Managed Package v7.0.1

IMPLEMENTATION GUIDE | FEBRUARY 2017

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# Introduction

Oracle CPQ Cloud developed a Managed Package called the Salesforce Commerce Integration Managed Package, which extends Salesforce functionality by allowing Salesforce users to access CPQ Cloud while using Salesforce and seamlessly pass transaction and opportunity data between the two applications.

This implementation guide describes how to install and customize version 7.0 of the Salesforce Commerce Integration Managed Package. Oracle assumes that administrators planning to integrate Oracle CPQ Cloud with Salesforce using the Salesforce Commerce Integration Managed Package have experience managing a Salesforce implementation. To gain a better understanding of the functionality available in Oracle CPQ Cloud, the following training courses are available through Oracle University: CPQ Cloud Yellow Belt, Blue Belt Advanced BML, and Blue Belt Advanced Commerce.

### New Features in Managed Package Version 7.0

The Salesforce1 mobile offering from Salesforce has new mobile standards that are supported by CPQ Cloud 2016 R1. Using version 7.0 of the Salesforce Commerce Integration Managed Package, administrators can integrate CPQ Cloud with Salesforce1. This integration supports all of the existing capabilities of the desktop integration between CPQ Cloud and Salesforce on a mobile device. The Salesforce1 integration is packaged in the Salesforce Reference Application, which includes updated cascading stylesheets (CSS) to make the CPQ mobile experience look more like Salesforce1.

**Note:** The Salesforce1 integration does not affect the CPQ Cloud-Salesforce desktop integration. Version 7.0 of the Salesforce Commerce Integration Managed Package supports both the mobile integration and the desktop integration.

Complete the following steps to integrate the CPQ Cloud mobile UI with the Salesforce1 mobile UI:

1. Install the Salesforce1 mobile application to use Salesforce on a mobile device.
2. Install the Salesforce Reference Application. The Salesforce Reference Application applies to both Salesforce and Salesforce1.
3. Install version 7.0 of the Salesforce Commerce Integration Managed Package.

### Salesforce1 Integration Notes

Consider the following when using the Salesforce1 integration:

- When adding a New quote button, expand the Buttons area of the Related List Properties – Oracle Quotes and Orders pop-up window shown in Figure 1. Select the New check box under Standard Buttons. This creates a standard New button for related lists as opposed to manually adding the New Quote button. Salesforce1 only supports the standard button. For additional information, refer to step 10 of the *Adding Quote List to a Page Layout* section.

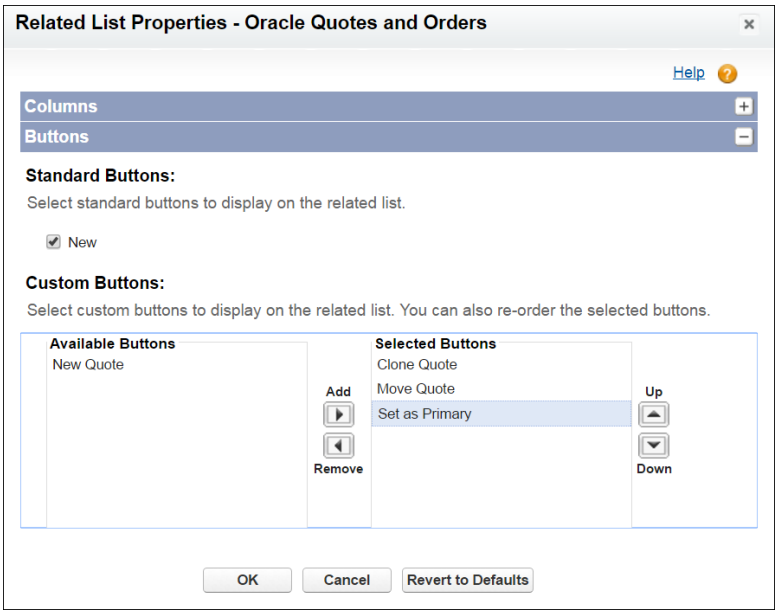



Figure 1: Related List Properties – Oracle Quotes and Orders Button Panel

- The Print action opens a new page in the iFrame with a Return to Quote button in the center. Users can view PDF and DOCX output documents in this iFrame.
- When the New button is clicked from the Salesforce1 mobile application to create a new quote and the Cancel button is then clicked to cancel the quote, the Salesforce1 Home page or a blank page sometimes displays instead of the Oracle Quotes and Orders page.
- When using the Salesforce1 application on an Android device, a blank page displays upon navigating to a CPQ Cloud quote. As a workaround for this Salesforce1 issue, navigate to Settings > Applications > Application Manager > SF1 App. Click the Manage Storage button and click "Yes" to log out current users. Upon logging back in, the issue is resolved and users can successfully navigate to a CPQ Cloud quote on their Android device.
- By default, Apple Mobile Safari sets the Accept Cookies option to "Sites I Visit," which causes issues for canvas apps. Use the Salesforce suggested settings for Apple Cookie settings, which involves setting the Block Cookies setting to "Never." Otherwise, CPQ Cloud will not have permissions to set cookies and cannot log in users via the Salesforce Canvas App. For additional information, refer to the Canvas Developer Guide.

**Prerequisites**

- Oracle CPQ Cloud site version 2016 R1 or later with the characteristics described in the *Preparing Oracle CPQ Cloud* section.
- A Salesforce site with the characteristics described in the *Preparing* section.
- Version 7.0 of CPQ Cloud's Salesforce Commerce Integration Managed Package.

## Supported Devices, Operating Systems, and Browsers

**Apple iOS**

- Operating System: iOS 9.1
- Screen Resolution: Portrait 1536 x 2048
- Browser: Safari 9.1

**Android**

- Operating System: Android 5.1 Lollipop
- Screen Resolution: Portrait 1536 x 2048
- Browser: Chrome 50.0

**Note:** A Salesforce1 Mobile App is available for both platforms and can be downloaded from the App Store or Google Play Store (depending on device).

## Bug Fixes

The following bug fixes are included in v7.0 and v7.0.1 of the Managed Package.

| 7.0.1 Bug ID | Bug Description | Resolution |
|---|---|---|
| 25462274 | When CPQ sites were integrated with Salesforce Managed Package 7.0, and a Salesforce user without permission to create orphan quotes created a quote without providing an opportunity Id, they were sent to the Quote edit page and received an error that the siteId was null. | Salesforce users without permission to create orphan quotes are now prompted to provide the opportunity Id and will not be allowed to continue until the Id is provided. |
| 25410167 | When CPQ sites were integrated with Salesforce Managed Package 7.0, Salesforce Partner Users could not create a quote in Communities using the standard "New Oracle Quote" button. | Salesforce Partner users can now create quotes using the standard "New Oracle Quote" button. |
| 25410165 | The Salesforce Managed Package 7.0 dynamic update to Salesforce instance ID references for imported scripts failed. | Dynamic script reference errors have been resolved and will correctly update to the current Salesforce instance ID. |
| 25185702 | When CPQ sites were integrated with Salesforce Managed Package 7.0, and a new Partner User account was created in Salesforce, then "Partner User" was selected for the Oracle CPQ User - Association to Organization, the Access Type showed values for internal users: (Buy, Full, SalesAgent, and ChannelAgent). | When a new Partner User account is created in Salesforce, and "Partner User" is selected for the Oracle CPQ User - Association to Organization, the Access Type shows values for Partner Organization Users: (Restricted, Buy, and Full access). |
| 24963752 | When "Date" fields that had "between" filters were used for Field Mapping to the Quote and Opportunity objects in Salesforce Managed Package 7.0, and the Quote object field value was NULL, the Opportunity field was incorrectly populated with a '1/1/1900' value. | When "Date" fields that have "between" filters are used for Field Mapping to the Quote and Opportunity objects, and the Quote object field value is NULL, the Opportunity field is not populated. |

| | | |
|---|---|---|
| 24934519 | When CPQ sites were integrated with Salesforce Managed Package 6.03 or 7.0, the Data Loader encountered limitation errors and could not be used to update Salesforce "User" objects. | The Data Loader can now be used to update Salesforce "User" objects. |
| **7.0 Bug ID** | **Bug Description** | **Resolution** |
| 22079924 | When punching into Salesforce using an iOS tablet device and accessing a CPQ Cloud transaction, users were unable to scroll on a CPQ Cloud quote in 2015 R1. | Users can now punch in to Salesforce using an iOS tablet device, access a CPQ Cloud transaction, and successfully scroll on a CPQ Cloud quote. |
| 23108727 | When attempting to synchronize a user to CPQ Cloud using v6.x of the Managed Package, the synchronization failed when the user provided a delegated approver. | When synchronizing a user to CPQ Cloud, the synchronization no longer fails when a delegated approver is provided. |

**Provide Feedback**

Oracle welcomes your comments and suggestions on improving this documentation. Please send your feedback to: cpqcloud_documentation_us_grp@oracle.com.

## Preparing Salesforce

Submit a ticket on My Oracle Support to prepare CPQ Cloud for the Managed Package. While My Oracle Support is resolving your ticket, complete the *Creating a Service Request and Providing OAuth Integration Values* sections of this document.

Complete each task up to and including the *Creating a Service Request* and *Providing OAuth Integration Values* for all of your Salesforce environments. For example: If you have a sandbox environment and a production environment, complete both sets of tasks twice and include both sets of information in your ticket.

**Note:** The Managed Package is not supported and should not be installed on Salesforce Professional Edition organizations.

### Confirming the Salesforce User and Environment

To install the Salesforce Commerce Integration Managed Package, you need access to a Winter 2016 or later Salesforce environment.

If you have a sandbox org, install and test the Managed Package on the sandbox org first.

You must have access to a Salesforce user whose profile contains the following User Permissions:

- API Enabled
- Customize Application
- View Setup and Configuration
- Modify All Data
- Download AppExchange Packages

Unless the customer made significant modifications to the default Salesforce setup, a user with the System Administrator profile should already have the above permissions.

### Setting Up Salesforce for OAuth

If you have more than one Salesforce environment that needs the Managed Package installed, complete the following setup steps for both environments simultaneously.

#### Creating the Connected App

1. Log in to Salesforce as an administrator.
2. From the upper-right corner of the page, click **Setup**.
3. Navigate to **Build** > **Create** > **Apps**. The Apps page opens.
4. Under Connected Apps, click **New**. The New Connected App page opens.

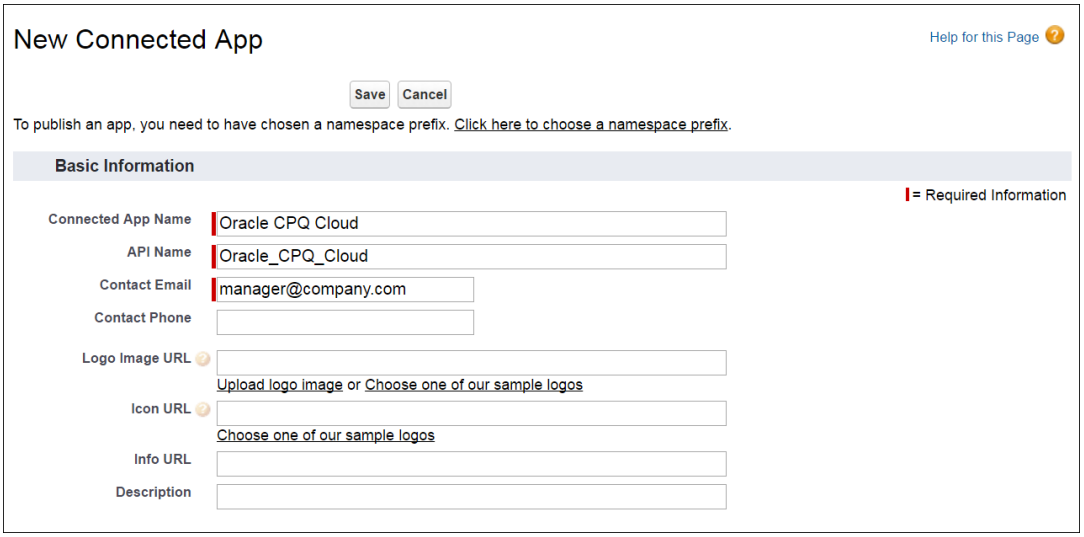



Figure 2: New Connected App Page

5. In the Connected App Name field, enter Oracle CPQ Cloud.

**Note:** The Connected App Name field is a required field. Populate the field with the API Name of the Custom App created for the site.

6. The value in the API Name field auto-populates to Oracle_CPQ_Cloud. If a connected app named "Oracle CPQ Cloud" was previously deleted, you may need to provide another name for the connected app, such as "Oracle CPQ Cloud 1." Use the name you enter wherever "Oracle CPQ Cloud" is referenced in this implementation guide.
7. In the Contact Email field, enter the email address of the individual in charge of maintaining the CPQ Cloud implementation.

**Note:** The email address entered should match the value entered for the Administrator Email in the Oracle CPQ Cloud Commerce Settings in Salesforce. For additional information, refer to the *Specifying Values for Oracle CPQ Cloud Custom Settings* topic.

8. Under API (Enable Oath Settings), select the **Enable OAuth Settings** check box.

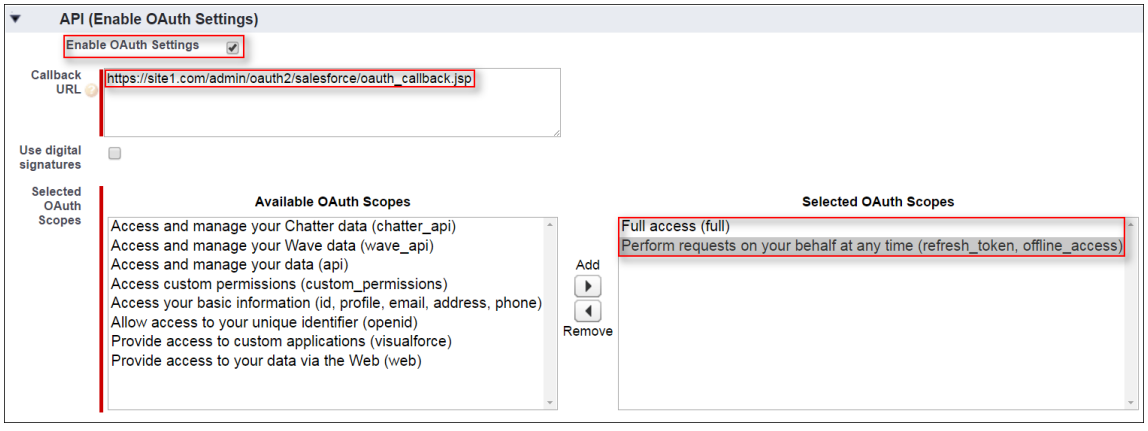



Figure 3: API (Enable OAuth Settings)

9. In the Callback URL field, enter the following:

`https://[yoursite].com/admin/oauth2/salesforce/oauth_callback.jsp`

**Note:** [yoursite] is the name of the CPQ Cloud site. For example: site1.bigmachines or site1.oracle.

10. Under Selected OAuth Scopes, add the following options:
    - Full access (full)
    - Perform requests on your behalf at any time (refresh_token, offline_access)
11. Under Canvas App Settings, check **Force.com Canvas**.

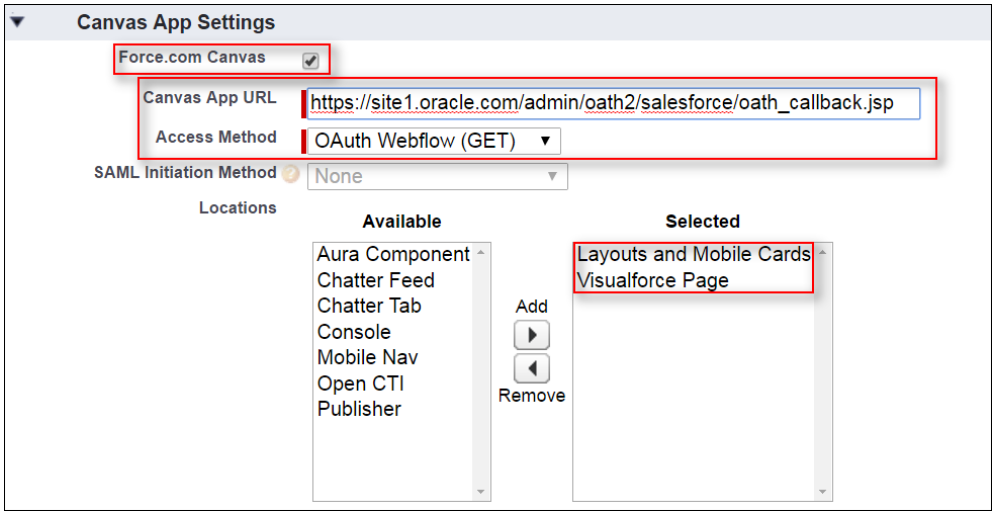



Figure 4: Canvas App Settings

12. For the Canvas App URL, enter the following:

    `https://[yoursite].com/admin/oauth2/salesforce/oauth_callback.jsp`

**Note:** [yoursite] is the name of the CPQ Cloud site. For example: site1.bigmachines or site1.oracle.

13. Set the access method to `OAuth Webflow(GET)`.
14. Under Locations, add "Layouts and Mobile Cards" and "Visualforce Page."
15. Click **Save**. When the following message displays, click **Continue**.

Figure 5: Connected App Message

### Creating a Service Request and Providing OAuth Integration Values

1. Log in to Salesforce as an administrator.
2. From the upper-right corner of the page, click **Setup**.
3. Navigate to **Build** > **Create** > **Apps** to open the Apps page.
4. Under Connected Apps, click **Oracle CPQ Cloud**.

Figure 6: Connected Apps

5. Copy the Consumer Key value shown under API (Enable Oath Settings). You will need this value to complete step 8.

Figure 7: Consumer Key

6. Select **Click to reveal** to show the Consumer Secret value.
7. Copy the Consumer Secret value. You need this value to complete step 8.
8. Open a ticket on My Oracle Support and include the Consumer Key and Consumer Secret values. In the ticket, include the following information:
    a. Enter the Consumer Key into the Salesforce Client Key field. To view where the Consumer Key is generated, refer to Figure 7: Consumer Key.
    b. Enter the encrypted Consumer Secret value into the Salesforce Consumer Secret field. To view where the encrypted Consumer Secret value is generated, refer to the **Click to reveal** link in Figure 7: Consumer Key.

**Note:** Before the CPQ Cloud – Salesforce integration works in testing, My Oracle Support must fulfill the support portal ticket. Continue with the remainder of the implementation setup while waiting for the fulfillment of your request. When your ticket is fulfilled, the Salesforce SOAP API used by CPQ Cloud is upgraded to version 31.

## Authorizing Profiles

1. From the upper-right corner of the page, click **Setup**.
2. Navigate to **Build** > **Create** > **Apps** to open the Apps page.
3. Under Connected Apps, click **Manage**.

Figure 8: Connected Apps Panel

4. From the Connected App Detail area of the page, click **Edit**.

Figure 9: Connected App Detail

5. Under OAuth policies, select “Admin approved users are pre-authorized” from the Permitted Users drop-down list.

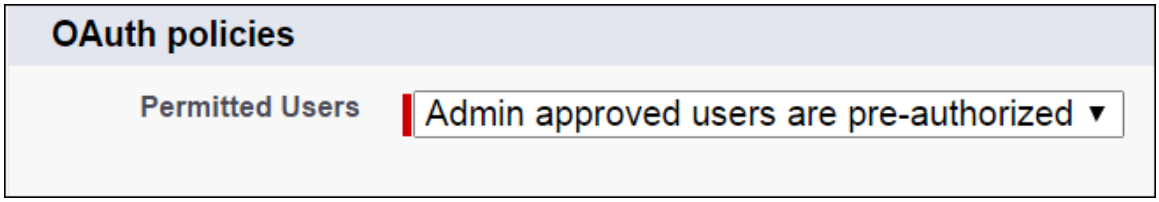



Figure 10: OAuth Policies

6. Click **Save**.
7. Under the **Profiles** section, click **Manage Profiles** to open the Application Profile Assignment page.

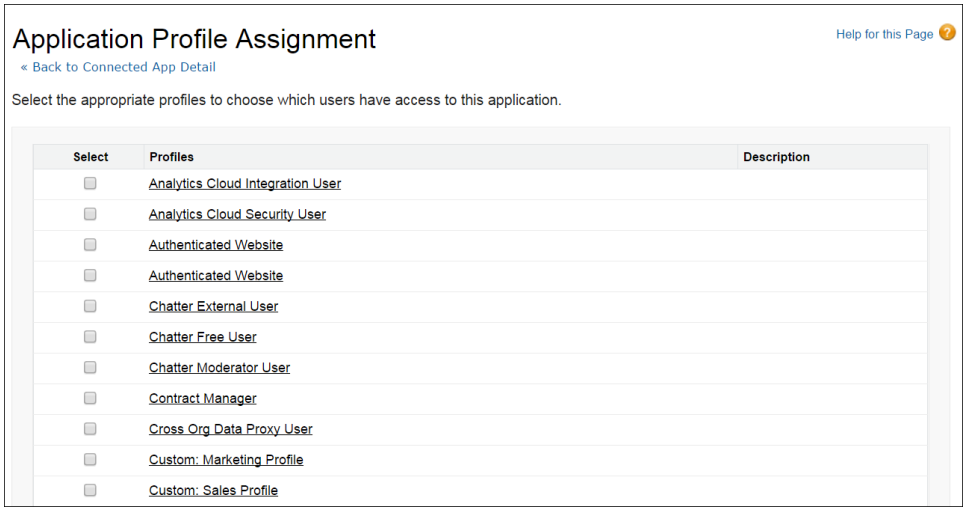



Figure 11: Application Profile Assignment

8. From the Application Profile Assignments page, select the profiles that will use CPQ Cloud.
9. Click **Save**.

## Preparing Oracle CPQ Cloud

The Reference Application is the foundational installation of CPQ Cloud prior to customer-specific implementations or setting changes being applied. This document assumes that as the administrator, you are starting with a build that is a copy of the Reference Application or have access to a similar build to compare against.

**Note:** While this implementation guide does not describe setting up your CPQ Cloud site, some key points to consider when comparing your site to the Reference Application are provided below.

### Creating CPQ Cloud Logins

At least two logins are required for installing the Salesforce Commerce Integration Managed Package:

- **CPQ Cloud User Login**: Used for creating and managing users. In CPQ Cloud, click the My Profile icon in the upper right corner of the page to open the My Profile page. Then, select the **Create/Modify Users** check box.

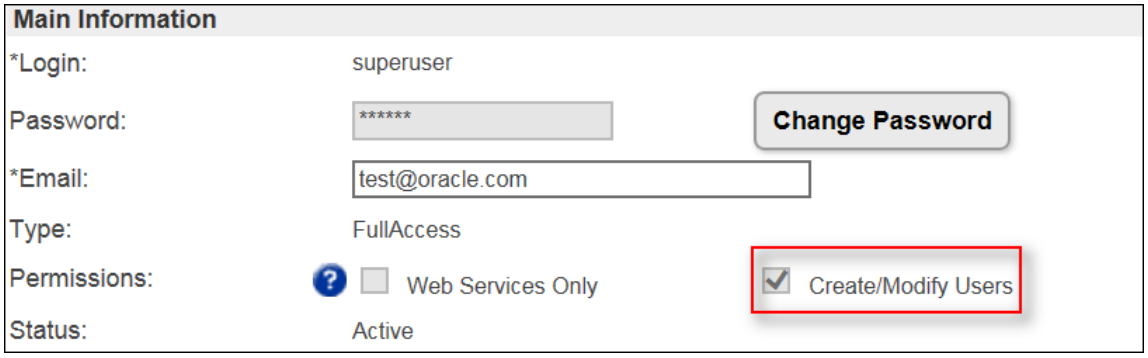



Figure 12: Create/Modify Users Check Box

- **Superuser Login**: Used for more advanced tasks such as syncing parts between the software products.

### Establishing a Parts Master

Using a Parts Master establishes a consistent way to create and manage individual parts shared between Salesforce and CPQ Cloud without the possibility of duplication. A Parts Master ensures that every part is unique and has a unique ID.

Decide which software—CPQ Cloud or Salesforce—is your Parts Master. A user with a super user login uses the software (e.g. CPQ Cloud or Salesforce) to synchronize parts and update the non-master.

**Consider the following when Salesforce or CPQ Cloud is the Parts Master:**

- CPQ Cloud can have multiple currencies per Price Book, regardless of whether Salesforce or CPQ Cloud is the Parts Master.
- CPQ Cloud IT Operations must set the parameter partner_max_export_size to the result of the calculation: 200 / (number_of_currencies + 1)

**Note:** Salesforce limits the number of batch operations performed per API call, which is the reason for this constraint. Before installing the Managed Package, open a ticket on My Oracle Support to request this change.

**Consider the following when CPQ Cloud is the Parts Master:**

Valid and unique part numbers are a requirement regardless of which system is the Parts Master. When CPQ Cloud is the Parts Master, this requirement has no impact on the Managed Package integration. The field is populated by CPQ Cloud during the synchronization batch job. The synchronization is performed after the Managed Package is installed. For additional information, refer to the *Setting Up Products* section.

**Consider the following when Salesforce is the Parts Master:**

- All new and existing Salesforce parts that you want visible in CPQ Cloud must have valid and unique Part Numbers.
- Oracle CPQ Part Number is a custom field used for synchronizing models, which are collections of parts.
- To update existing parts in Salesforce, download the parts using the Salesforce bulk Data Loader tool, modify the parts in Excel, and then re-upload the parts to Salesforce.

**Note:** If multiple CPQ Cloud sites are setup to integrate with one Salesforce instance, you can use multiple CPQ Cloud sites as the Parts Master for integration with the same Salesforce site. The administrator must ensure that duplicate part numbers are not synced to Salesforce from separate CPQ sites.

### Synchronizing Models

To synchronize CPQ Cloud Models with Salesforce, the parts in Salesforce that comprise the model must have the same value in Salesforce's **Oracle CPQ Part Number** field as they do in the **Model's Name** field in CPQ Cloud.

#### Site Settings

In CPQ Cloud, a "Partner Login Server" property specifies the URL of the CRM system with which CPQ Cloud is integrating. Set this property to either the Salesforce Sandbox URL or the Salesforce Production URL. Open a ticket on My Oracle Support to request this change.

**Note:** Site properties are not overwritten when sites are copied. If an integration worked in the past or any part of an integration is currently working, then the integration link is probably correct.

#### Web Services

Some features in the Salesforce Commerce Integration Managed Package rely on CPQ Cloud Web Services. To use these Web Services, ensure that their WSDLs are generated.

1. Log in to CPQ Cloud as a Full Access user.
2. Navigate to the Admin Home Page.
3. Under Integration Platform, click **Web Services**. The Web Services Test page opens.

4. Click **Generate Schema and WSDL**. A list of CPQ Cloud Web Services displays. The **Last Modified** column indicates whether the WSDL was deployed. If yes, the date and time of the last deployment is provided.
5. Click **Generate** in the desired row to generate the WSDL for that web service.

**Note:** To take advantage of the User Management functionality in CPQ Cloud, generate both the Users and Security WSDLS. Regenerate these WSDLS after upgrading CPQ Cloud, so the WSDLS reflect the most current CPQ Cloud functionality. No other WSDLS are used by the Managed Package. Depending on the specifics of your implementation, you may need to generate the other WSDLs as well.

## Installing the Salesforce Commerce Integration Managed Package

Use the following links to access version 7.0 of the Salesforce Commerce Integration Managed Package:

- Sandbox Edition - Salesforce Commerce Integration Managed Package Version 7.0
- Developer Edition, Professional Edition, Enterprise Edition, Unlimited Edition - Salesforce Commerce Integration Managed Package Version 7.0

### Installation Notes

- When a Salesforce login screen opens, log in as the Salesforce user described in the *Confirming the Salesforce User and Environment* section.
- When the Install Oracle CPQ Commerce Integration page opens, enter `Commerce7` in the Password field.

Figure 13: Managed Package Installation – Password Field

### Security Settings

We recommend selecting **Install for All Users**. This gives Salesforce users access to fields in Salesforce that make it possible to access CPQ Cloud.

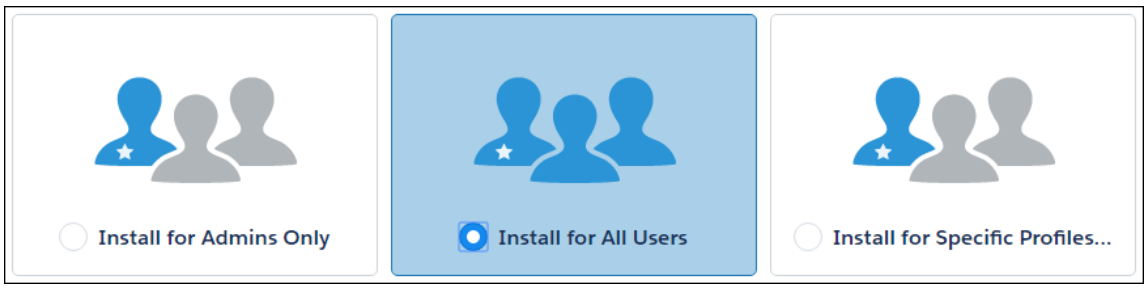



Figure 14: Managed Package Security Settings

**Note:** Profiles in Salesforce contain restrictions. Some data is only editable by entering Edit mode while other data is only editable by entering View mode. By selecting **Install for All Users**, making changes to editable data in View mode is not necessary. However, you still may want to modify data that is editable in Edit mode. For additional information, refer to the *Updating Salesforce Profile Permissions* section.

### Install Managed Package

Before creating a Managed Package, all testMethods associated with the package must pass. When you install a Managed Package in any environment, Salesforce gives you the option of running all testMethods, including those that already exist in your environment and are not part of

the Managed Package. If any of the new or existing testMethods fail, Salesforce notifies you and stops the installation. If this occurs, you must repeat all of the previously conducted steps. To prevent failures from occurring while installing the Managed Package, complete the following steps:

1. Log in to Salesforce.
2. Navigate to **Setup** > **Build** > **Develop** > **Apex Classes**.
3. Click **Run All Tests** to see if there are any Apex failures.

To install the Salesforce Commerce Integration Managed Package:

1. Click **Install**. The installation may take a few moments.

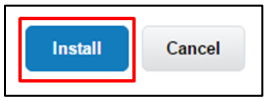



Figure 15: Managed Package Install Button

When the installation completes, an “Installation Complete!” message displays. You will also receive an email when the installation completes.

Figure 16: Install Oracle CPQ Cloud Commerce Integration Screen

2. When the Installation Complete message displays, click **Done** to go to the **Installed Packages** page.

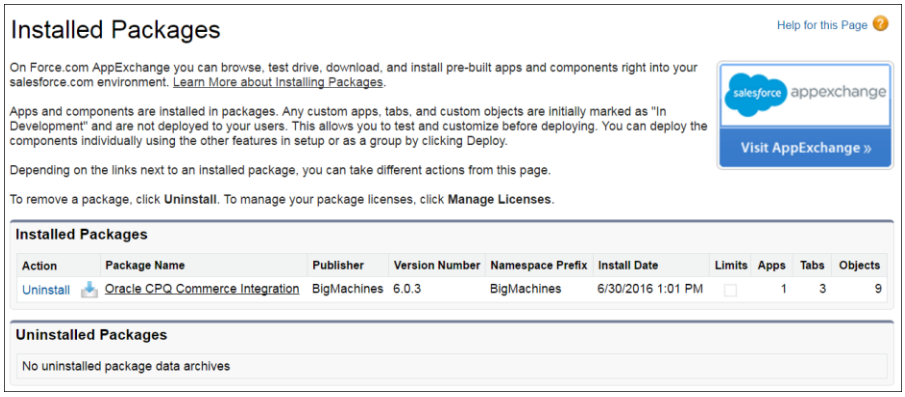



Figure 17: Installed Packages

## Completing the Connected App

### Populating the Lifecycle Class Field

1. Log in to Salesforce as an administrator.
2. From the upper-right corner of the page, click **Setup**.
3. Navigate to **Build** > **Create** > **Apps** to open the Apps page.
4. Under **Connected Apps**, click **Edit** next to **Oracle CPQ Cloud**.

Figure 18: Connected Apps

5. Under **Canvas App Settings**, click the **Lookup** icon next to the **Lifecycle Class** field.

Figure 19: Lifecycle Class Lookup

6. In the search field, enter: `OracleOAuthLifecycleHandler`.

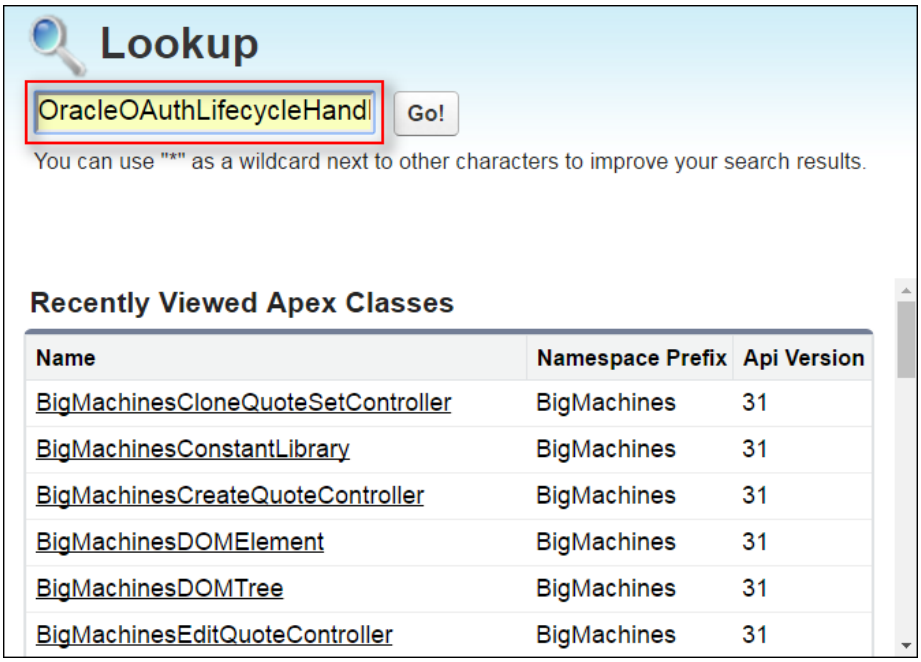



Figure 20: OracleOAuthLifecycleHandler Lookup

7. Click **Go**.
8. Select OracleOAuthLifecycleHandler from the list of results.
9. Click **Save**.

**Note:** You must use the Apex Class Lookup to input the Lifecycle Class. The input is not saved when entered into the field manually.

## Enabling OAuth Security in Oracle CPQ Cloud

OAuth Security is discussed in more detail in the OAuth 2.0 Secure Login Functionality Online Help topic. You must log in to CPQ Cloud as a Full Access user to view the Help.

**Setting up CPQ Cloud for OAuth**

1. Log in to CPQ Cloud as a Full Access user.
2. Click **Admin** to go to the Admin Home Page.
3. Under General, select **General Site Options**.
4. Select **Yes** for Enable CRM OAuth.
5. Click **OK** to the warning popup.

**Note:** Each Salesforce user password that was previously stored in CPQ Cloud is removed from CPQ Cloud once a token is created for that user. With OAuth, storing the tokens is not necessary and results in improved security.

6. Click **Apply** or **Update** at the bottom of the General Site Options page.

### Generating a Token for the CPQ Cloud Superuser

In order for any type of data synchronization to occur between Salesforce and CPQ Cloud, the CPQ Cloud "superuser" must have a token. Until you need to synchronize data between Oracle CPQ Cloud and Salesforce, you can continue the integration setup even when the "superuser" has not generated a token.

Complete the following steps to generate a token:

1. Log in to CPQ Cloud as a superuser.
2. Click **My Profile**.
3. Click **Partner Info**.
4. Enter your Salesforce user name in the **Login** field.
5. Click **Generate Token**.

The basic integration is complete, but you need to make changes to fully take advantage of the integration between Salesforce and CPQ Cloud.

## Customizing Components for Quote Integration

There are several basic changes you need to make to ensure the components in the Managed Package work with your specific CPQ Cloud site.

- Update Salesforce user profile permissions to grant access to the objects from the Managed Package.
- Set up a CPQ Cloud site object, so Salesforce knows how to connect with CPQ Cloud.
- Place the CPQ Cloud quote object on the Opportunity page layout and optionally on the Accounts page layout.
- If the quote object was placed on a new page layout, update the Salesforce Profile permissions to allow the correct users to see the new page.
- (Optional) Set values in the Oracle CPQ Custom Settings object to specify where error messages should go.

### Updating Salesforce Profile Permissions

Salesforce prevents customers from modifying default profiles. The System Administrator profile always has access to new Managed Packages. Updates to other default profiles are not permitted to access new Managed Packages.

Complete the following steps to update Salesforce profile permissions.

1. Navigate to **Setup** > **Administer** > **Manage Users** > **Profiles**. The Profiles page opens.
2. Click the **Edit** link next to the Profile you want to edit.

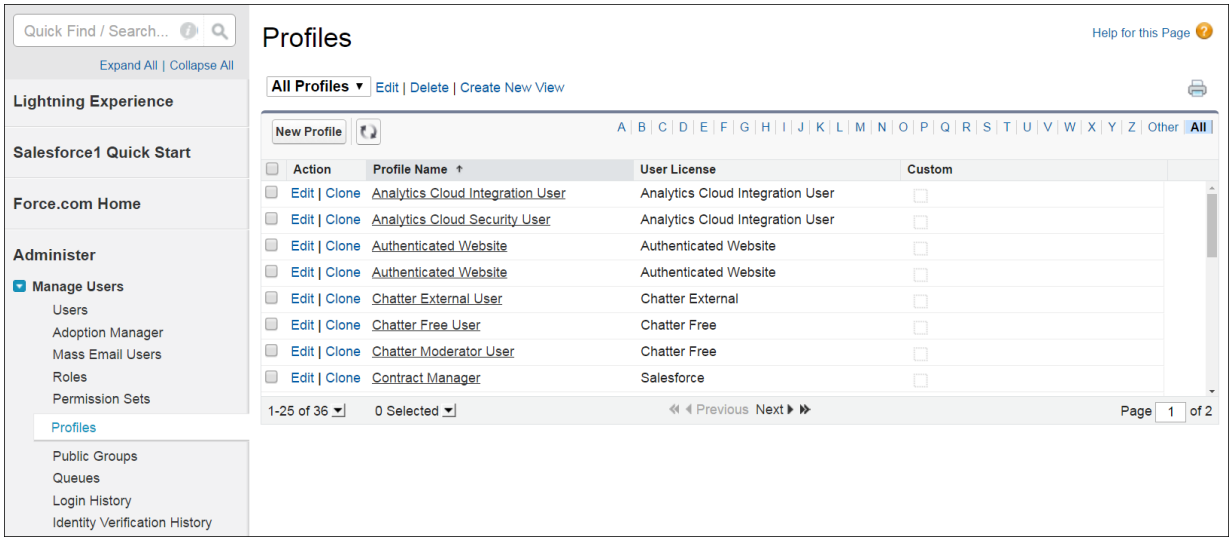



Figure 21: Profiles

There are several settings you may want to change under Custom App Settings.

| Setting | Recommendation |
|---|---|
| **Oracle CPQ Cloud** | Select **Visible** for Oracle CPQ Cloud.<br>By making the CPQ Cloud app visible, users can select it from the App drop down list in the upper right corner of Salesforce.<br>Leave the Oracle CPQ App visible for any profile that accesses CPQ Cloud. For other profiles, un-check the option to avoid clutter. |
| **Connected App Access** | Select **Oracle CPQ Cloud**. |
| **Custom Tab Settings** | Tabs that are set to **Default On** are visible to users in the list of extra tabs and appear along the top of their screen when an App that contains the tab is selected.<br>Tabs that are set to **Default Off** are visible to the users in the list of extra tabs but never appear along the top of their screen.<br>Tabs that are set to **Tab Hidden** do not appear in the list of extra tabs.<br>Oracle CPQ Cloud Site Setup: Select **Default On** for any profile that administers the Managed Package. For other profiles, select **Tab Hidden**.<br>Oracle Quotes and Orders: Select **Default On** for any profile that uses Quotes and Orders. This tab defaults to a view for Recent Oracle Quotes and Orders. For other profiles, select **Tab Hidden** to avoid clutter.<br>Oracle Quotes and Orders (VF): Use this tab, driven by Visualforce, as an alternative to the Oracle Quotes and Orders tab. It does not default to a view for Recent Oracle Quotes and Orders. If you are not using the Oracle Quotes and Orders tab, select **Default On.** Otherwise, select **Tab Hidden** to avoid clutter. |
| **Overwrite users' personal tab customizations** | Select to allow existing users to see the changes you make. If you set any of the tabs to **Tab Hidden**, you should also check this box.<br>If you leave the check box un-checked, your changes only affect users that have not been created yet. |

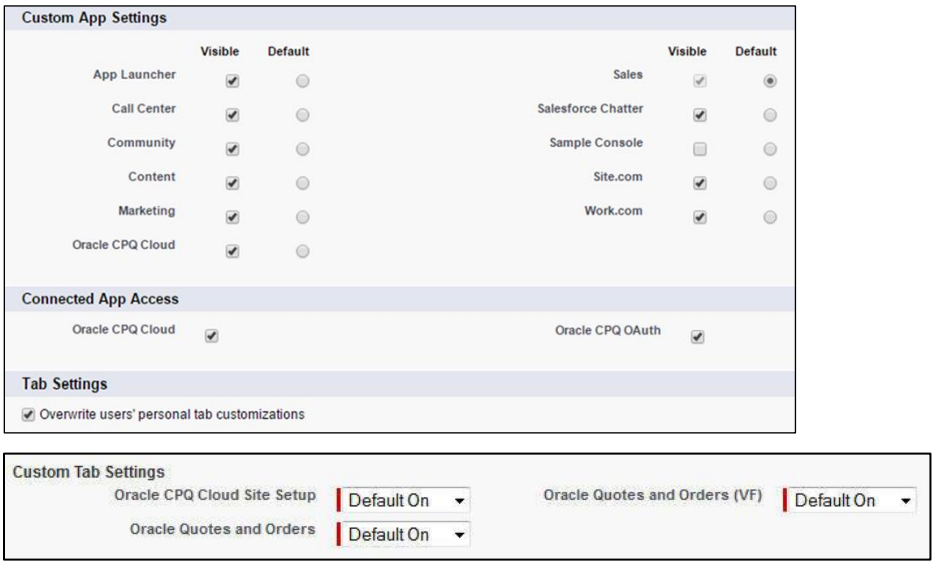



Figure 22: Custom App Settings

3. Scroll to the Custom Object Permissions options towards the bottom of the page. The Salesforce Managed Package contains five custom objects. To use the Managed Package, users must have a profile with at least read access to all five custom objects.

| Custom Object | Recommended Permissions |
|---|---|
| **Oracle CPQ Cloud Field Mappings** | Only administrators need a profile with more than Read permissions to this object. Other users should have a profile with ONLY read permissions to this object. |
| **Oracle CPQ Cloud Site Setup** | Only administrators need a profile with more than Read permissions to this object. Other users should have a profile with ONLY read permissions to this object. |
| **Oracle Quotes and Orders** | If a user will create or edit quotes in CPQ Cloud, their profile must have Read, Create, and Edit permissions to this object.<br>You may optionally add the Delete permission to this object. |
| **Oracle Users** | Whether a non-admin user can see or modify fields in the Oracle Users panel of a user profile is at the discretion of the customer.<br>Individual Oracle Users fields, such as the Synchronize with Oracle CPQ Cloud field, can have access restricted through the Oracle Users object or through Profiles. |
| **Oracle CPQ Cloud Quote Products** | If a user will create or edit quotes in CPQ Cloud, their profile must have Read, Create, Edit, and Delete permissions to this object. |

Table 1: Custom Object Permissions

The following shows a typical non-admin user's permissions to the Managed Package custom objects.

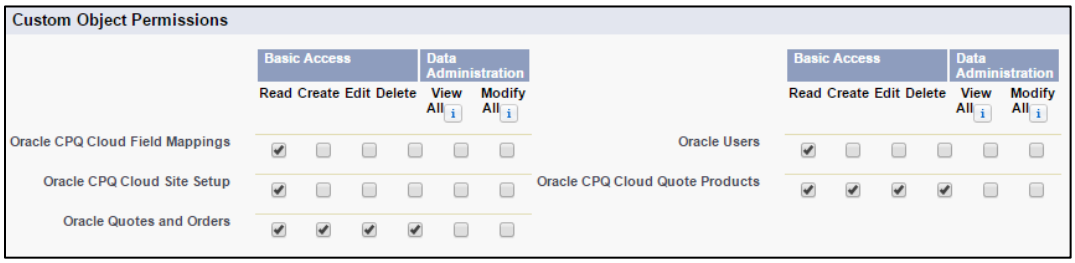



Figure 23: Typical Non-Admin Custom Object Permissions

4. Click **Save** after making the desired changes.

If you did not grant access to all users when installing the Managed Package, you must enable access for all Oracle CPQ Cloud Visualforce pages by completing the following steps.

1. From the Profiles page in Salesforce, click the **Profile Name** link.
2. Under Enabled Visualforce Page Access, click **Edit**. The Enable Visualforce Page Access page opens.
3. Move the following Oracle CPQ Cloud pages from the left column to the right column:
    - FieldMappingEdit
    - OpportunityProductDeleteRedirection

- OpportunityProductEditRedirection
- QuoteCloneSelection
- QuoteCreate
- QuoteEdit
- QuoteHome
- QuoteMove
- QuoteProductRedirection
- SiteEdit
- SiteHome
- SiteVie

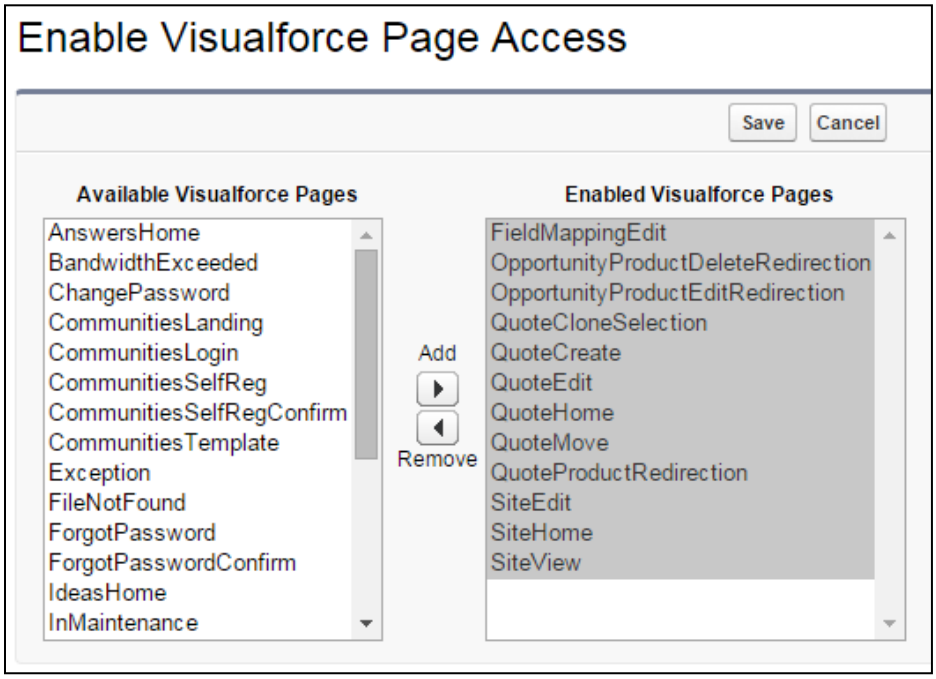



Figure 24: Enable Visualforce Page Access Page

4. Click **Save**.

**Setting Up the Oracle CPQ Cloud Site Object for a Salesforce Connection**

Oracle CPQ Site Setup is a Custom Object in the Salesforce Commerce Integration Managed Package. This object contains all of the site-specific information for connecting to CPQ Cloud. You must create an instance of this object and enter values for all the fields to point to your CPQ Cloud Commerce Process.

To update all of these values, get the correct values from CPQ Cloud.

1. In CPQ Cloud, go to the Admin Home Page.
2. Under Commerce and Processes, click **Process Definition**. The Process page opens.

3. From the **Navigation** drop-down menu for your Commerce process, select **Integrations.**
4. Click **List**.
5. Click **View Parameters**. A set of values display. You need to enter these values in Salesforce in subsequent steps, so keep the tab open or copy the values into a document.

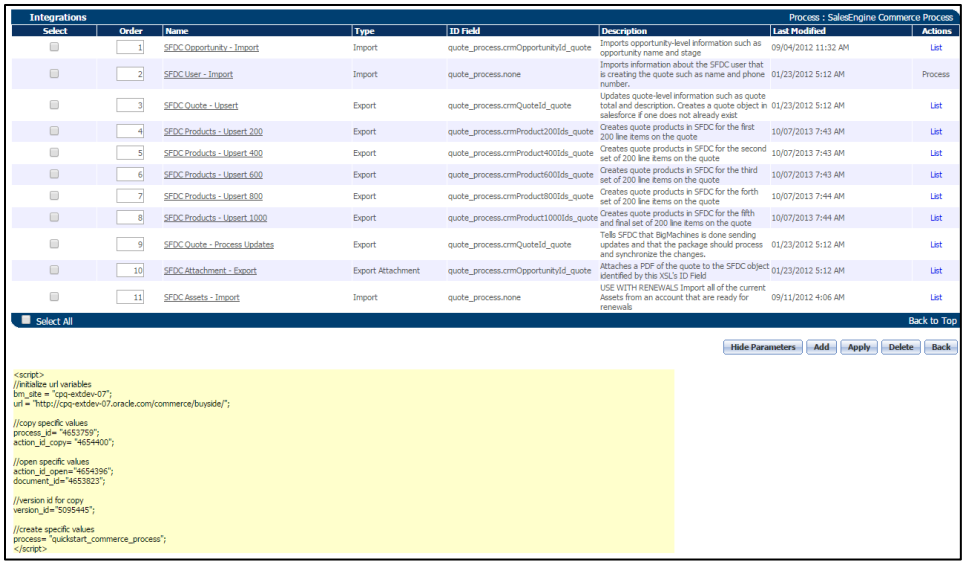



Figure 25: Parameters

6. In Salesforce, click the **Plus** sign on the top row of tabs.

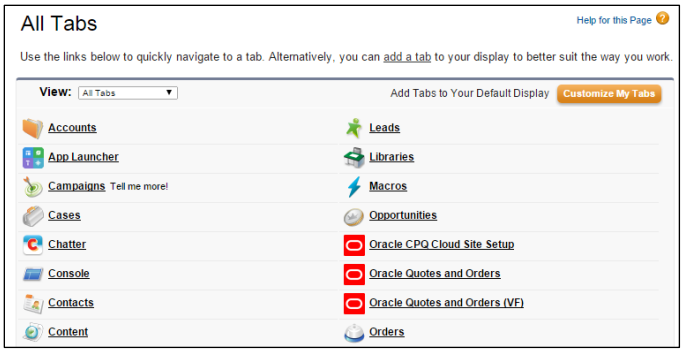



Figure 26: All Tabs

7. Click **Oracle CPQ Cloud Site Setup**.
8. Click **New**.

Figure 27: Oracle CPQ Cloud Site Setup

9. Enter the values from the CPQ Cloud **View Parameters** section into the corresponding fields on the Oracle CPQ Cloud Site Edit page.

**Note:** If your values have URLs with oracle.com instead of bigmachines.com, enter the full URL in the field instead of just the site's name space.

To take advantage of the User Management functionality, enter the login credentials for the CPQ Cloud user responsible for creating and managing users. The only requirement for this user is that "Permission to create/modify users" is checked in the user's CPQ Cloud profile.

Customers often either create a user that is only used for the integration, or use the "superuser" user. For more information, see the *Updating Salesforce Profile Permissions* section.

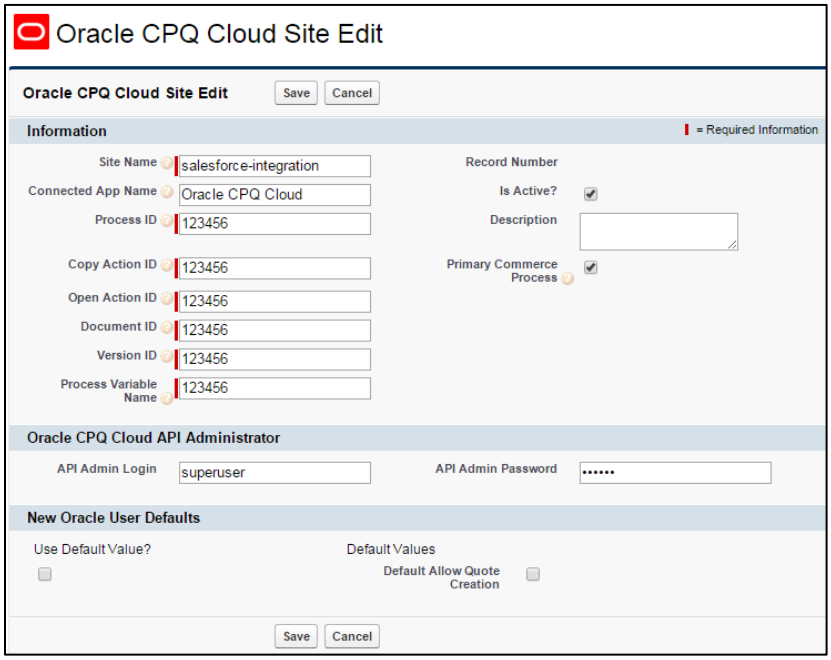



Figure 28: Oracle CPQ Cloud Site Edit

**Note:** The Connected App Name field is a required field. Populate the field with the API Name of the Custom App created for the site.

10. Click **Save**. The New Field Mapping button displays.
11. Click **New Field Mapping** and select the objects and fields to map between them. For example: You may want Quote object fields mapping to Opportunity object fields. For more information about mapping, refer to your Salesforce documentation.

    The required fields for each object have pre-defined mappings. You do not need to create any mappings for the integration to work. In addition to creating mappings for your custom fields, you can choose to create mappings for other standard (non-custom) fields. You may want to test the basic integration first before adding any field mappings. If so, come back to this step at a later time.

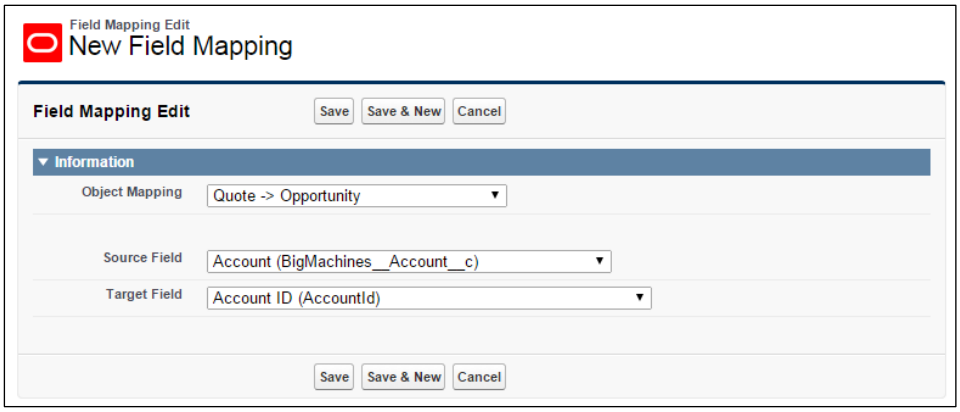



Figure 29: New Field Mapping

12. Click **Save**.

### Placing a Quote Object in a Layout

Complete the following two tasks in any order. The user cannot see the quote object in the layout until both tasks are completed.

- Place the object on a user's layout in Salesforce.
- Grant the user permission to see the object.

### Override Opportunity Products Buttons and Links

Change **Salesforce Opportunity Product** buttons and links to modify how Salesforce handles products that come from CPQ Cloud and products that are added to an opportunity directly in Salesforce.

When a user clicks the **Edit** or **Delete** link next to an Opportunity Product, Salesforce evaluates where the product was created and directs the user appropriately.

- If a product was added to an opportunity because it was a quote product on the primary quote, Salesforce directs users to edit or delete that product in CPQ Cloud.
- If a product was added to an opportunity because the user clicked **Add Products** and manually selected the product in Salesforce, Salesforce relies on its own native functionality when the user clicks the **Edit** or **Delete** link.

By overriding the **Edit** and **Delete** links on the Salesforce opportunity product, the Managed Package either directs users to CPQ Cloud or allows them to use native Salesforce functionality, as appropriate.

1. In Salesforce, navigate to **Setup**.
2. Navigate to **Build** > **Customize** > **Opportunities** > **Opportunity Products** > **Buttons and Links**. The Buttons, Links, and Actions page opens, showing the buttons and links that can display on pages and the related lists that contain opportunity products.
3. Under Custom Links, click **Edit** next to the Edit link.

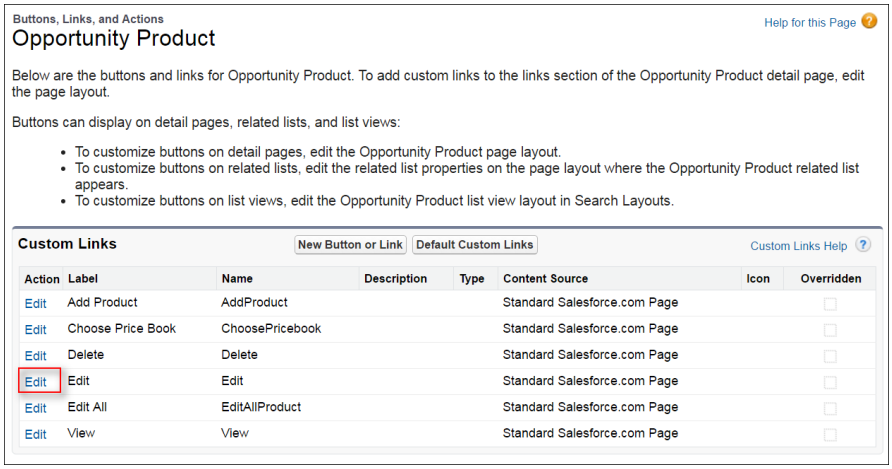



Figure 30: Buttons, Links, and Actions Page

4. For **Override With**, select **Visualforce Page**.
5. Select **Oracle CPQ Cloud Redirect Edit Opportunity Product** from the drop-down list.
6. Click **Save**.

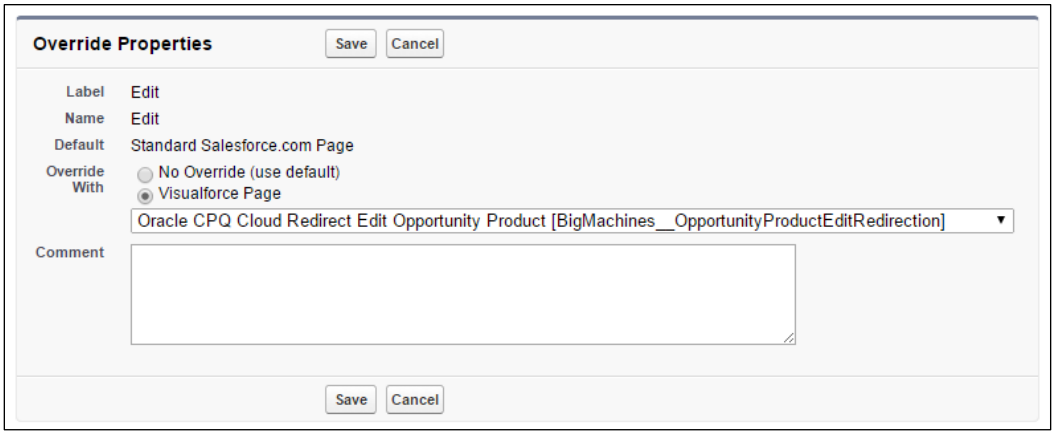



Figure 31: Override Properties

7. Repeat the above steps for the **Delete** button.

### Adding the Quote List to an Opportunity Page Layout

You are now ready to expose the quote-related list on the opportunity page. Complete the following steps for each layout that users will have the ability to access in CPQ Cloud.

1. In Salesforce, navigate to **Setup**.
2. Navigate to **Build** > **Customize** > **Opportunities** > **Page Layouts**. The Opportunity Page Layout page opens.
3. Click the **Edit** link next to the Page Layout you want to edit.

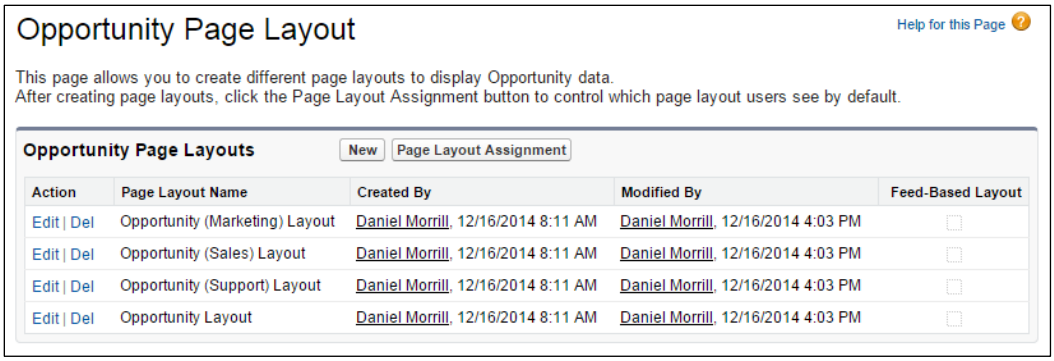



Figure 32: Opportunity Page Layout

4. From the top left scrollable panel, click Related Lists.

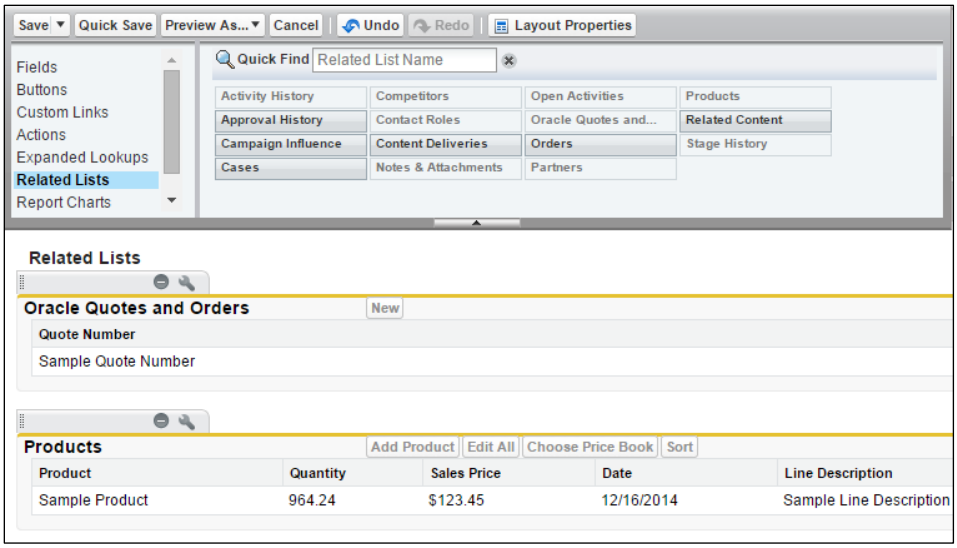



Figure 33: Related Lists

5. Drag and drop the Oracle Quotes and Orders Related List from the top section to the first available spot underneath the heading of the **Related Lists** section.

**Note:** The Oracle Quotes and Orders Related List is usually directly above the **Products** Related List.

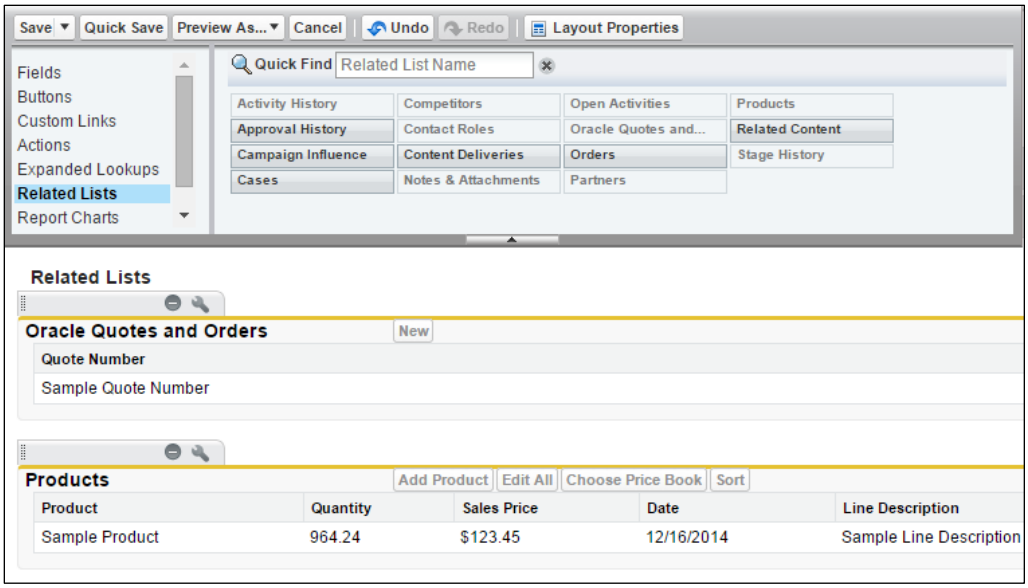



Figure 34: Related Lists with Oracle Quotes and Orders Added

6. Click the **Wrench** icon in the tab above the Oracle Quotes and Orders Related List.

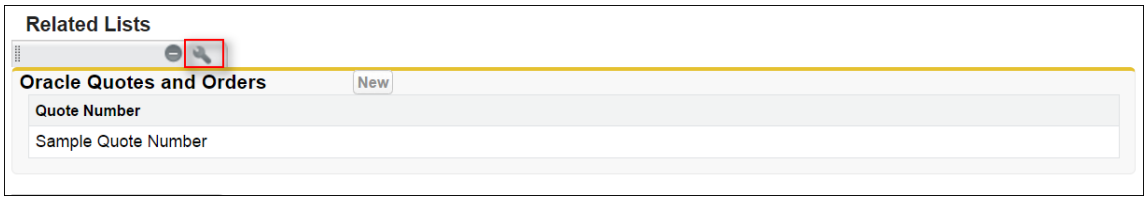



Figure 35: Wrench Icon Above the Oracle Quotes and Orders Related List

7. From the Related List Properties – Oracle Quotes and Orders pop-up window, confirm that the fields you want to display are listed under **Selected Fields**. The following are recommended fields:
   - Quote Number
   - Description
   - Status
   - Amount
   - Is Primary?
   - Last Modified Date
8. From the Sort By drop-down menu, select the field to sort by.
9. Specify whether you want the values to display in ascending or descending order.

**Note:** We recommend sorting by Quote Number in descending order. The most recently created quotes will display at the top of the list without requiring users to display the Created By field in the list.

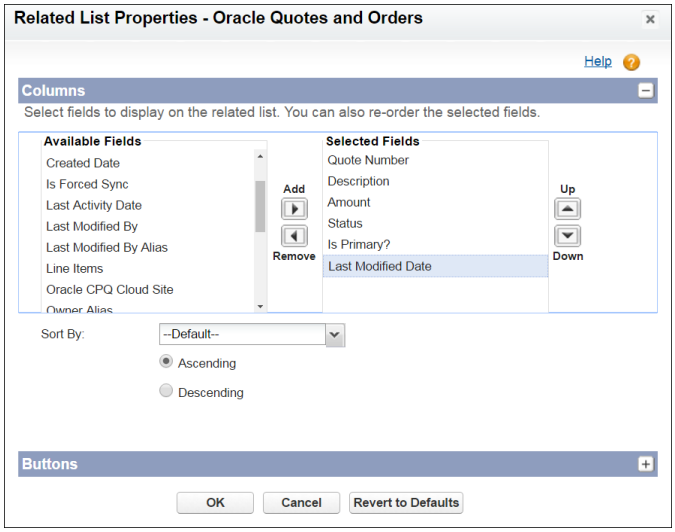



Figure 36: Related List Properties – Oracle Quotes and Orders Columns Panel

**Note:** Currency and Number fields are right-aligned. For an improved user experience, we recommend that the fields to the right of these fields are not left-aligned text fields. This makes the data easier to read but has no impact on the data values.

10. When finished with the columns, expand the Buttons area of the Related List Properties – Oracle Quotes and Orders pop-up window.
11. Under Standard Buttons, confirm the **New** check box is selected. To add quotes in Salesforce1, the check box must be selected.
12. Add Clone Quote, Move Quote, and Set as Primary to the **Selected Buttons** list and in the order presented.
13. Click **OK**. Optionally, repeat the above steps for the other Opportunity page layouts or Accounts page layouts that must show CPQ Cloud fields.

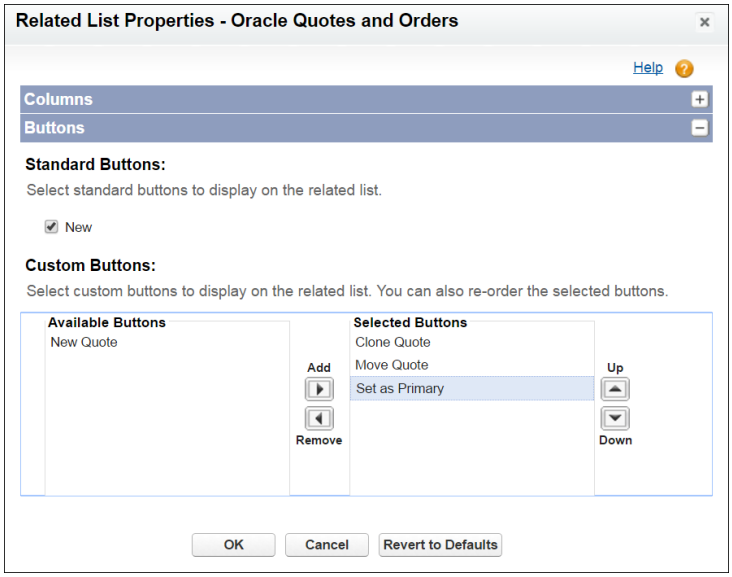



Figure 37: Related List Properties – Oracle Quotes and Orders Buttons Panel

### Adjust Profiles to Control Use of the Quote Page

You may want to prevent your users from adding opportunity products to opportunities directly from Salesforce. By having your users go through CPQ Cloud to add line items to an opportunity ensures that products are always accurately configured and opportunity totals have gone through any required approval workflows.

You can disable a user's ability to add products to a quote by using Salesforce. Complete the following steps to require users to add products through CPQ Cloud.

1. Click the **Wrench** icon above the **Products** related list.

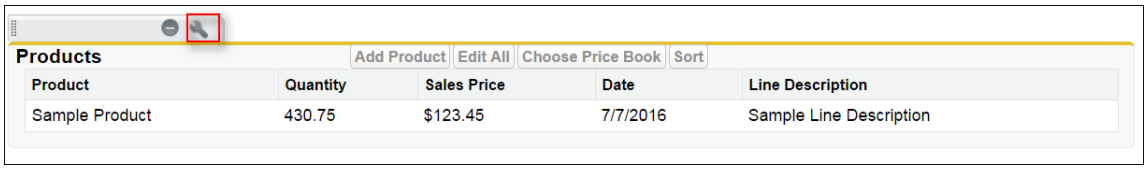



Figure 38: Products Related List

2. From the Related List Properties – Products pop-up window, expand the Buttons panel.
3. Uncheck **Add Product** and **Edit All**.
4. Click **OK**.
5. Click **Save** on the page layout.

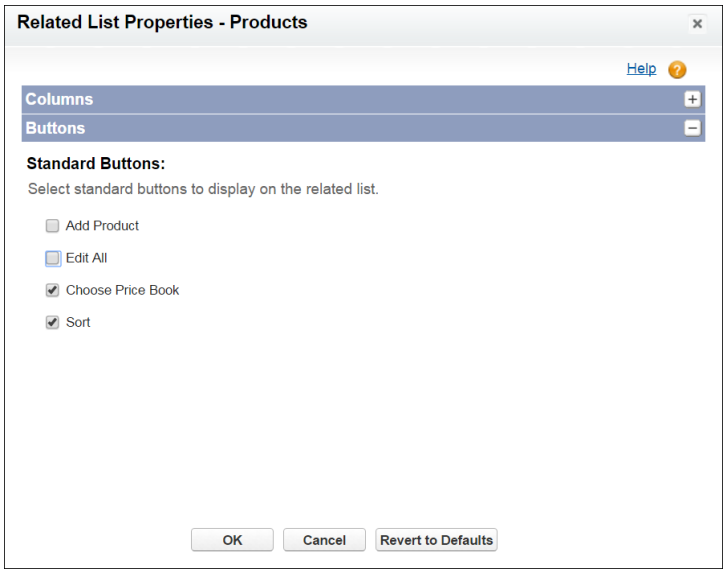



Figure 39: Related List Properties – Products

**Note:** Repeat the above steps for each page layout where users are required to add products to a quote using CPQ Cloud.

### Specifying Values for Oracle CPQ Cloud Custom Settings

Custom settings allow customers to specify certain aspects of the behavior of the Managed Package. They also provide a way for the Managed Package to add new functionality.

Check each setting and make sure it is set to the correct value for your implementation.

1. In Salesforce, navigate to **Setup**.
2. Navigate to **Build** > **Develop** > **Custom Settings** to open the Custom Settings page.
3. Click the **Manage** link next to **Oracle CPQ Cloud Commerce Settings**.

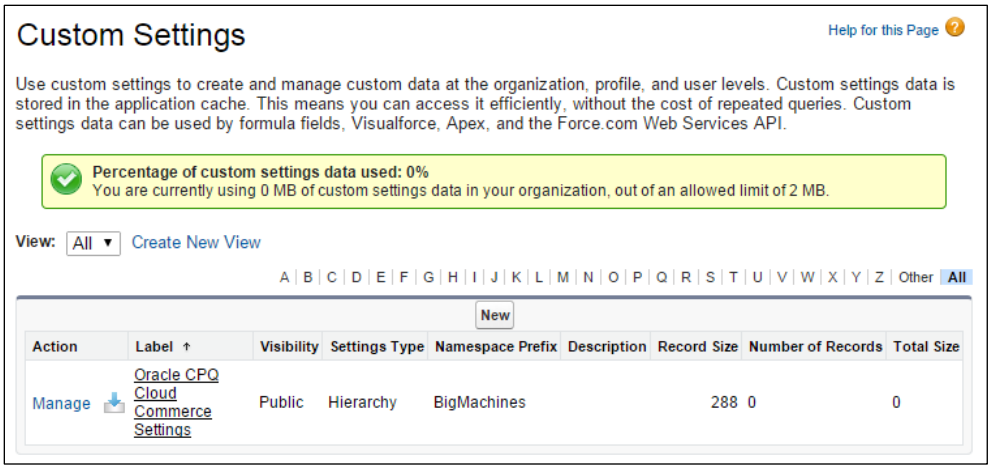



Figure 40: Custom Settings Page

4. From the Oracle CPQ Cloud Commerce Settings page, click **Edit.**

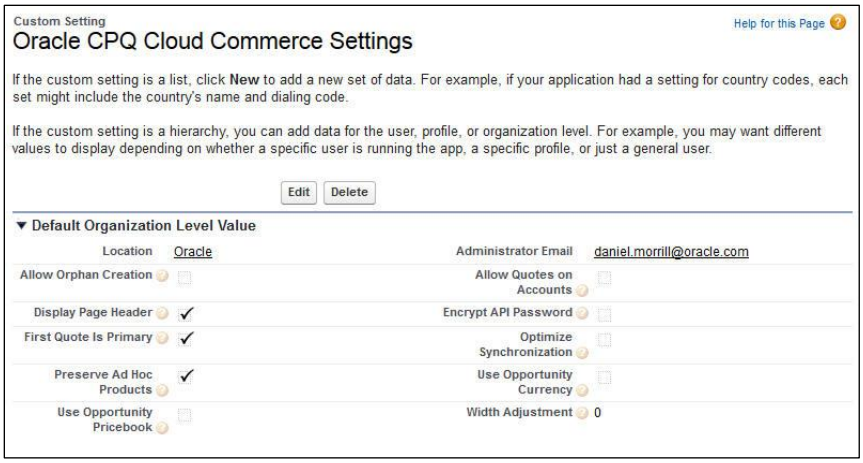



Figure 41: Custom Setting – Oracle CPQ Cloud Commerce Settings

5. Change the settings you want to update and click Save.

Descriptions of the Oracle CPQ Cloud Custom Settings are provided below.

| Setting | Description |
|---|---|
| **Administrator Email** | The email address of the person who should receive error messages when users run into issues with the integration.<br>This is helpful for troubleshooting and debugging.<br>This email should match the contact email entered in the *Creating the Connected App* section. |
| **Allow Orphan Creation** | If you want the ability to create quotes through the Salesforce UI that are not linked to a parent object, select this check box.<br>This option impacts the requirements when creating a quote using **Create New** in the sidebar but has no impact on quotes created through the Salesforce Data Loader. |
| **Allow Quotes on Accounts** | If you want the ability to create quotes through the Salesforce UI that are linked directly to an account without an opportunity, select this check box.<br>This option impacts the requirements when creating a quote using **Create New** in the sidebar but has no impact on quotes created through the Salesforce Data Loader. |
| **Display Page Header** | To display the standard Salesforce header on top of CPQ Cloud pages, select this check box. This creates a more consistent UI for your users. However, some customers remove the header to create a larger screen for CPQ Cloud. |
| **Encrypt API Password** | To hide the API password on the CPQ Cloud Commerce Settings page, select this check box.<br>Instead of displaying the password, asterisks appear and the password is encrypted before being stored and decrypted only when connecting to the CPQ Cloud site.<br>If this setting changes, your existing password is reset when the site information is viewed. |
| **First Quote Is Primary** | If you want the Managed Package to automatically set the first quote on any opportunity as the primary quote, select this check box.<br>Leave the box checked unless you are sure your users do not want this behavior. |
| **Optimize Synchronization** | If you are using the optimized Integration XSL files, select this check box.<br>If you are using an Integration XSL file labeled “SFDC Quote – Process Updates” in your Save action, then you are using the optimized Integration XSL files.<br>If you select this option and are not using the correct integration XSL files, your integration will not work.<br>The Reference Application has the new XSL files, so select this check box for new implementations. |
| **Preserve Ad Hoc Products** | If you want to preserve products added directly to the opportunity when syncing a quote, select this check box. When selected, the only opportunity products deleted when specifying a new primary quote are the products that were part of the quote that was previously primary. |
| **Use Opportunity Currency** | If you want newly created quotes to default to the same currency as the opportunity, select this check box. To use this option, you must configure CPQ Cloud with the same currencies as Salesforce. |
| **Use Opportunity Price Book** | If you want newly created quotes to default to the same Price Book as the opportunity, select this check box. If you are not using multiple Price Books, you do not need to select this check box. To use this option, CPQ Cloud Price Books must have the correct value for the Partner Price book ID field. |

| | |
|---|---|
| **Width Adjustment** | Enter the pixel size of the iFrame that displays CPQ Cloud. |

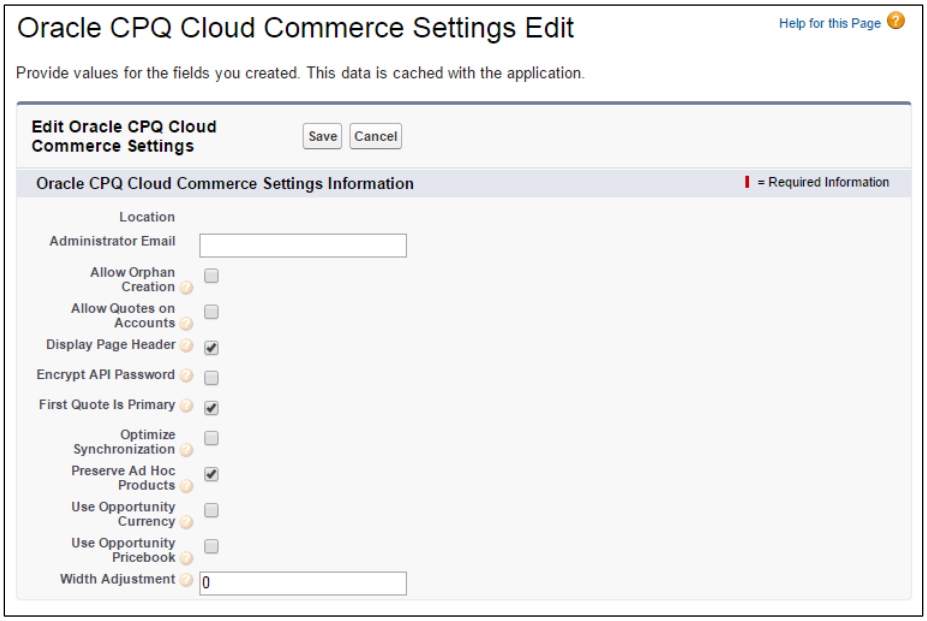



Figure 42: Edit Oracle CPQ Cloud Commerce Settings

**Note:** Use the **New** button on the Commerce Settings page to create additional Setting objects for specific users. This is useful for temporarily debugging sessions.

## Customizing Components for User Integration

Just as you did when setting up Quote integration, you must modify the User Management components of the Managed Package. This ensures the components work with your specific CPQ Cloud site. Some of the modifications already made will be re-used.

For User Management functionality to work, there are three required changes and several optional changes.

Required Changes:

- Set up remote sites for secure communication to let Salesforce know it's safe to send user-related information to CPQ Cloud.
- Provide Salesforce with CPQ Cloud login credentials for creating and modifying users.
- Display CPQ Cloud user fields, so Salesforce end users can see the fields.

Optional Changes:

- Create User Groups to which CPQ Cloud users can belong.
- Limit who can provision CPQ Cloud users.
- Select default settings to make provisioning users more efficient.
- If you are provisioning partners, display partner fields in user layouts.

### Setting up Remote Sites for Secure Communication

The Salesforce Commerce Integration Managed Package will attempt to communicate with the customer's CPQ Cloud site. As a security precaution, Salesforce does not allow any package to communicate with an external site unless that external site has been explicitly listed on the Remote Site Settings page. This security measure allows customers to easily see what sites their Salesforce site might communicate with at any time.

To allow the Managed Package to communicate with CPQ Cloud, create a Remote Site entry for the customer's CPQ Cloud site.

1. In Salesforce, navigate to **Setup**.
2. Navigate to **Administer** > **Security Controls** > **Remote Site Settings** to open the All Remote Sites page.

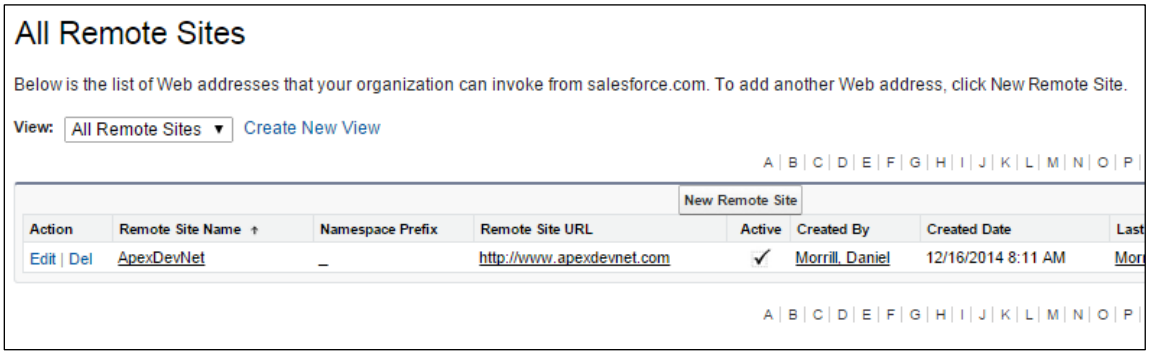



Figure 43: All Remote Sites Page

3. Click **New Remote Site** to open the Remote Site Edit page.

4. Enter the CPQ Cloud site name and URL.
5. Click **Save.**

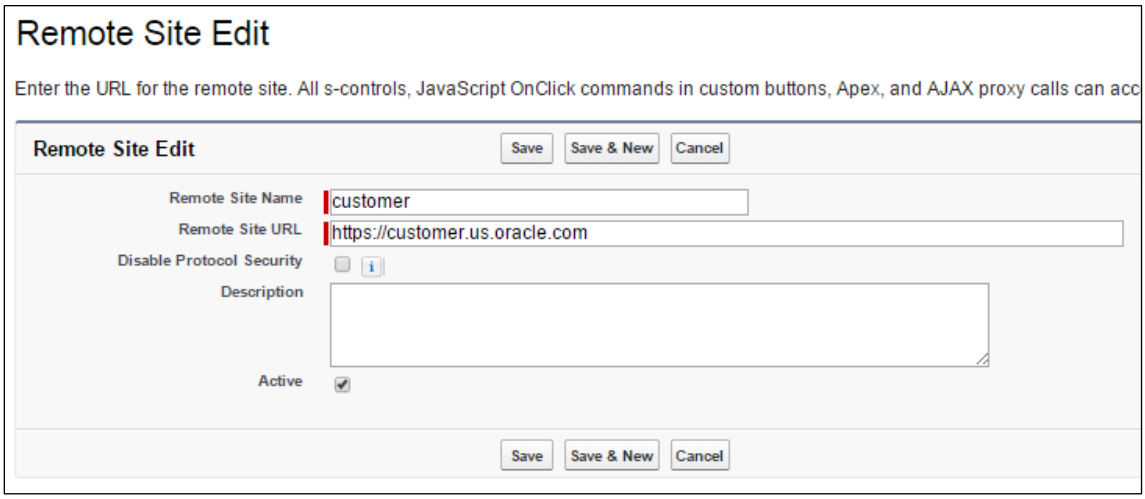



Figure 44: Remote Site Edit

Create a remote site entry for each CPQ Cloud site. For example, separate entries are needed for a test site and a production site. With these entries, you do not need to create a remote site entry each time you perform a sandbox refresh.

### Creating Oracle CPQ Cloud Login Credentials for User Syncs in Salesforce

An API Admin login is required to perform user syncs between Salesforce and CPQ Cloud. The only requirement for this user is that their CPQ Cloud profile has "Permission to create/modify users." Customers often either create a CPQ Cloud user that is only used for the integration, or they can use the superuser login credentials.

1. In Salesforce, click the **Plus** sign on the top row of tabs.

Figure 45: Access Oracle CPQ Cloud Site Setup

2. From the All Tabs page, click **Oracle CPQ Cloud Site Setup.**

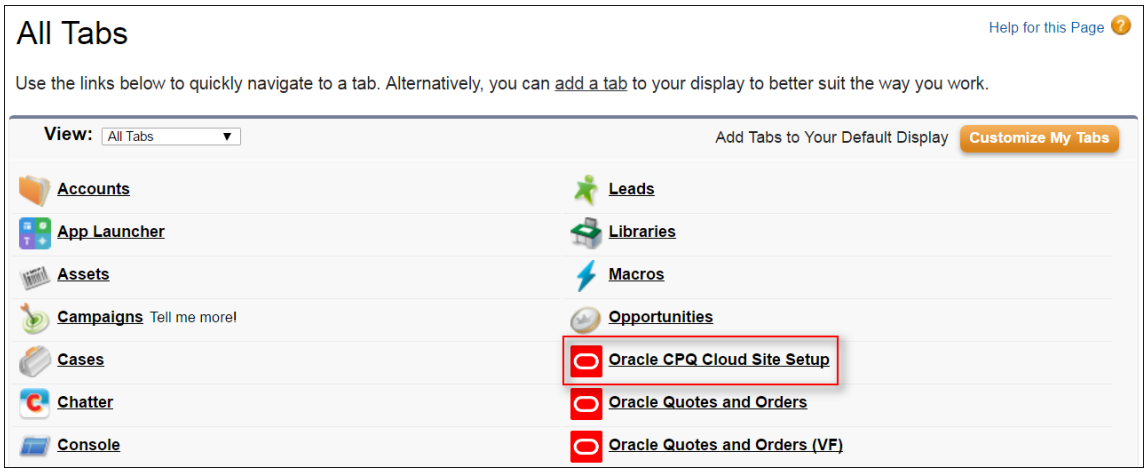



Figure 46: All Tabs Page

3. Select the site you created earlier.

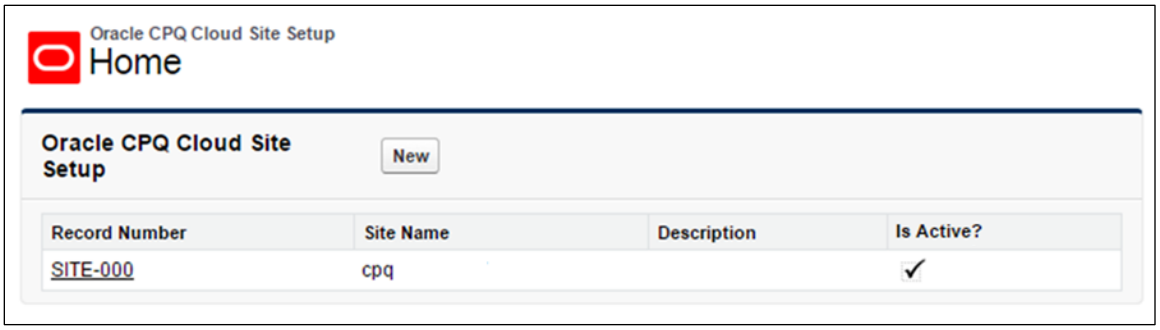



Figure 47: Oracle CPQ Cloud Site Setup

4. Click **Edit**.
5. From the **Oracle CPQ Cloud API Administrator** section, enter the login credentials for the CPQ Cloud user that will create and manage users.

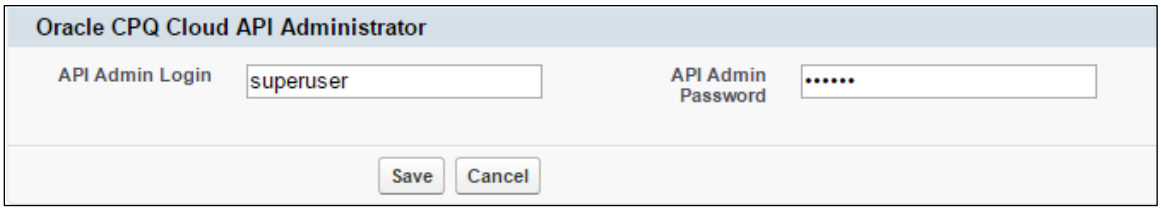



Figure 48: Oracle CPQ Cloud API Administrator

6. Click **Save**.
7. Click **Check Connection** to test the communication between Salesforce and CPQ Cloud.

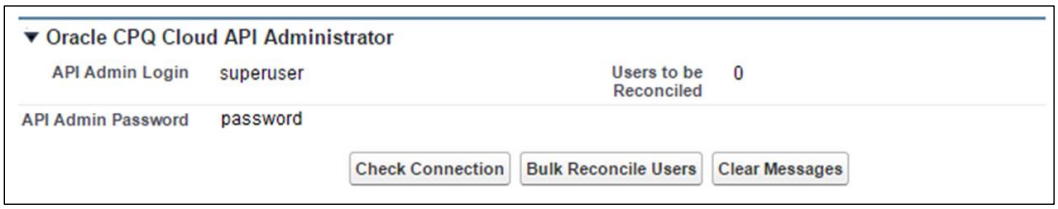



Figure 49: Oracle CPQ Cloud API Administrator – Check Connection Button

If the username and password you entered for the API Admin are correct, the following success message displays.

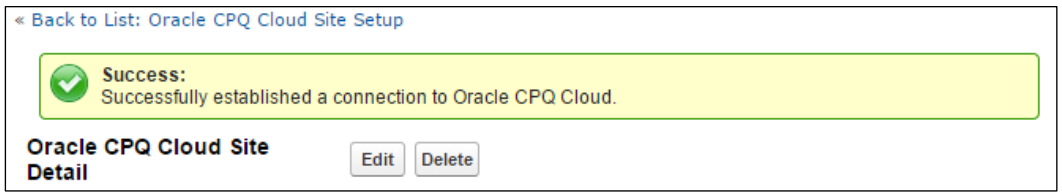



Figure 50: Successfully Established Connection to Oracle CPQ Cloud Message

If an error occurs, a message containing suggestions about how to troubleshoot the problem displays.

### Modifying a User Page Layout to Display Oracle CPQ Cloud Fields

Since Salesforce does not allow customers to modify which standard user fields can display or where they are positioned in the page layout, most customers do not modify their user page layouts. Instead, customers create a new page layout to contain new custom fields.

Check to see if the User Page layout was customized. If a new, customized page was already created, use that page to expose the CPQ Cloud fields. If a new page was not created, create one to expose the CPQ Cloud fields.

#### Changing the Page Layout Assignment

1. In Salesforce, navigate to **Setup**.
2. Navigate to **Build** > **Customize** > **Users** > **Page Layouts** to open the User Page Layout page.

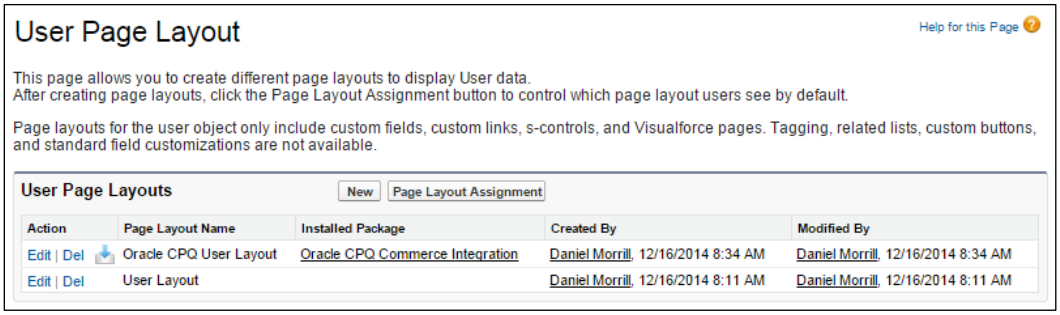



Figure 51: User Page Layout

3. Click **Page Layout Assignment**. The Page Layout Assignment page opens.
4. Click **Edit Assignment**.

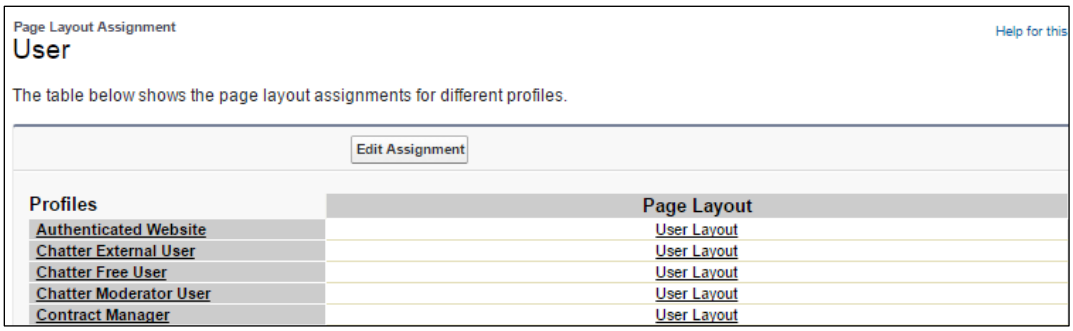



Figure 52: Page Layout Assignment

5. Select the row for each profile that might provision CPQ Cloud users or use CPQ Cloud. Use the Ctrl key to select multiple rows. If you are not sure if a profile needs the Oracle CPQ Cloud Page Layout, we recommend including it.

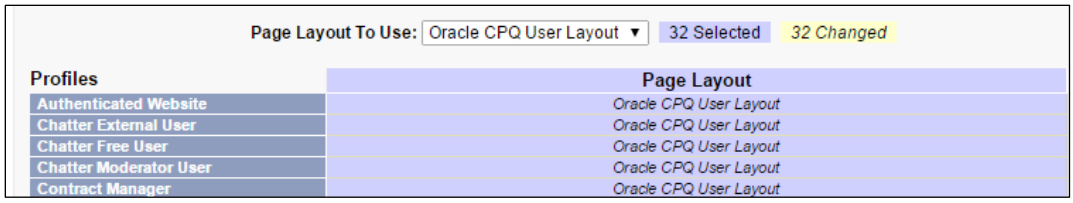



Figure 53: Profiles

6. From the **Page Layout To Use:** drop-down list, select `Oracle CPQ User Layout.`
7. Click **Save**.

## Editing Existing Page Layouts

1. In Salesforce, navigate to **Setup**.
2. Navigate to **Build** > **Customize** > **Users** > **Page Layouts** to open the User Page Layout page.

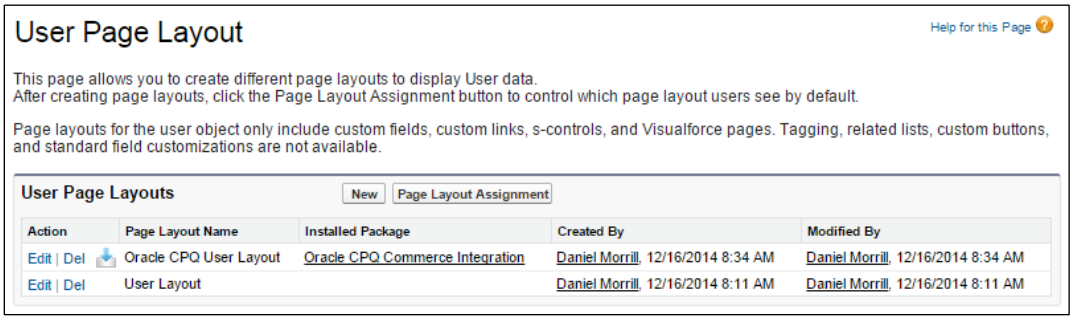



Figure 54: User Page Layout

3. Click the **Edit** link next to the page layout you want to modify.
4. If there is an **Oracle CPQ Cloud User Information** section on the layout, place your cursor on the top of the section. The Remove Section icon displays in the top-right corner of the section).
5. Click the **Remove Section** icon. If there is not an **Oracle CPQ Cloud User Information** section on the layout, skip this step.

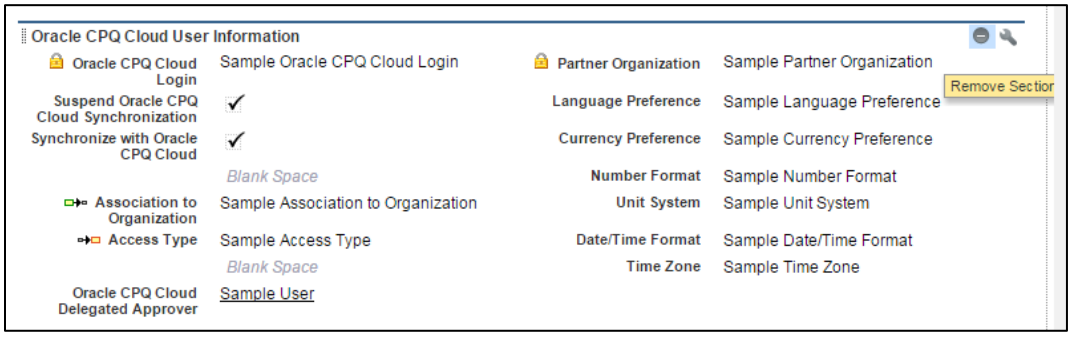



Figure 55: Oracle CPQ Cloud User Information

6. Click **Visualforce Pages**.

Figure 56: Oracle CPQ Cloud User Layout

7. Click and drag **Section** from the components panel to the layout.
8. Enter `View Oracle Users` for Section Name.
9. Select the **1-Column** radio button.
10. Click **OK**.
11. Click and drag **View Oracle Users** from the components panel to the **View Oracle Users** section in the layout.

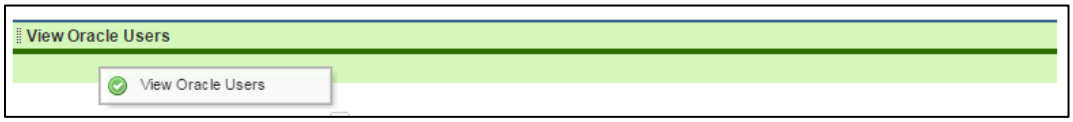



Figure 57: View Oracle Users

12. Click **Save**.

**Note:** Repeat the above steps for every page layout used by a profile that might provision CPQ Cloud users or use CPQ Cloud. If you are not sure whether a profile needs the Oracle CPQ Cloud Page Layout, we recommend including it.

### Applying Field-Level Security Settings to Oracle Users

If field-level security settings for User fields were ever changed for one or more profiles to prevent the profile from accessing the field, you must apply the same field-level security settings to the new Oracle User fields.

To make the necessary changes in Salesforce, navigate to **Setup** > **Customize** > **Users** > **Fields** > **User Custom Fields** > **Custom Field Name** > **Set Field-Level Security**.

### Overriding Oracle User Custom Field Pick List Values in Salesforce

If multiple CPQ Cloud sites are integrated with Salesforce, each CPQ Cloud site can override the Oracle User custom field picklist values in Salesforce. When editing a CPQ Cloud field that corresponds to an Oracle User custom field picklist value in Salesforce, the CPQ Cloud admin is shown a list of default values with a check box for each value. When selected, the corresponding value is used as the default for new Oracle Users rather than the default set on the Oracle User field in Salesforce.

**Note:** For more information about integrating multiple CPQ Cloud sites with one Salesforce instance, refer to the *Multiple CPQ Cloud Sites with One Salesforce Instance* section.

### Creating User Groups in Salesforce

You can update the available User Groups in Salesforce to match the list of User Groups on your CPQ Cloud site. This is an optional step.

#### Step 1: Retrieving Group Variable Names from CPQ Cloud

1. In CPQ Cloud, go to the Admin Home Page.
2. Under Users, click **Groups**. The Group Administration List opens. Leave the Group Administration List open or copy the variable names for all groups into a document. You must reference these values in later steps.

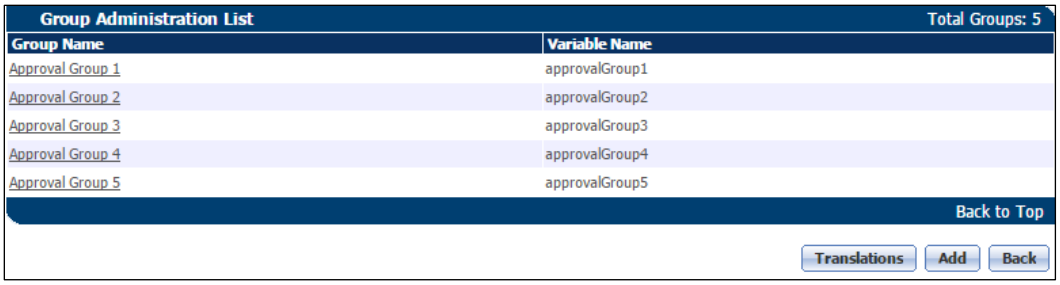



Figure 58: Group Administration List

#### Step 2: Adding CPQ Cloud Group Variable Names as Salesforce Picklist Values

1. In Salesforce, navigate to **Setup**.
2. Navigate to **Build** > **Create** > **Objects** to open the Custom Objects page.
3. Click **Oracle User**.
4. In the **Custom Fields & Relationships** panel, click **User Groups**.

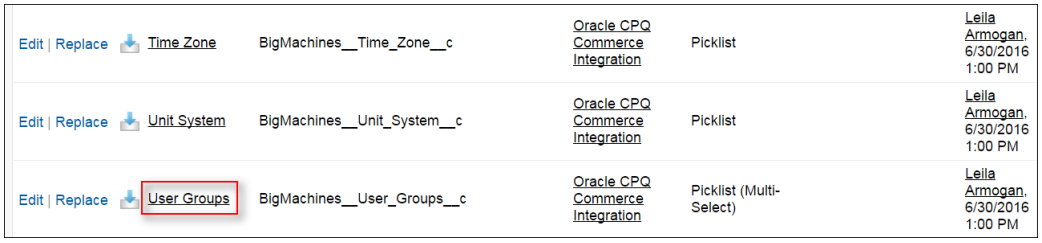



Figure 59: Custom Fields & Relationships

5. Click **New** at the top of the **Picklist Values** panel. The User Groups page opens.
6. Enter the variable names of each CPQ Cloud User Group that you retrieved from CPQ Cloud. Enter each variable name on a separate line.

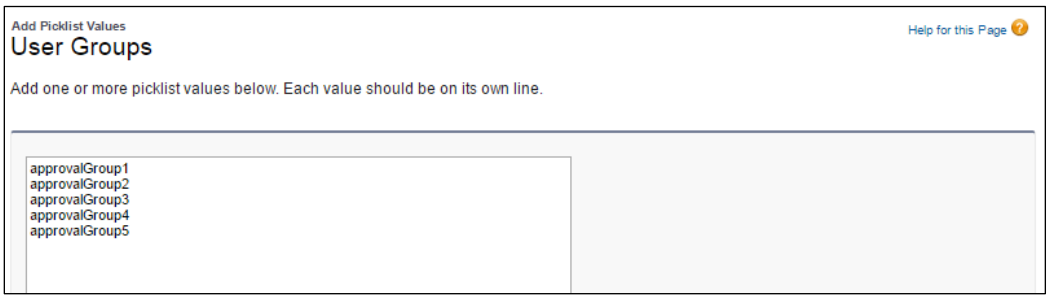



Figure 60: Add Picklist Values

7. Click **Save**.

8. In the **Picklist Values** panel, delete the Standard user group by clicking the **Del** link next to it, unless you have a group with a variable name of “Standard” in your CPQ Cloud site.

**Note:** There must be at least one user group.

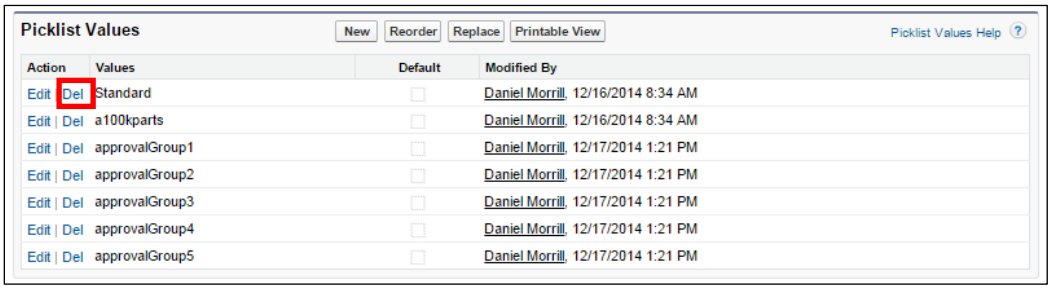



Figure 61: Picklist Values

### Limiting Who Can Provision Oracle CPQ Cloud Users

For any profile that should not have the ability to provision users in CPQ Cloud, mark the Provisioned in Oracle CPQ field as Read-Only. This is an optional step.

1. In Salesforce, navigate to **Setup**.
2. Navigate to **Build** > **Create** > **Objects**.
3. Click **Oracle User**.
4. Under **Custom Fields & Relationships**, click **Synchronize with Oracle CPQ Cloud.**

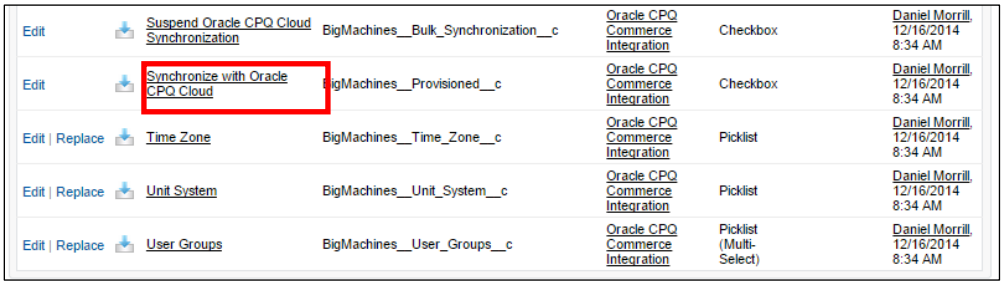



Figure 62: Synchronize with Oracle CPQ Cloud

5. From the Synchronize with Oracle CPQ Cloud (Managed) page, click **Set Field-Level Security**.

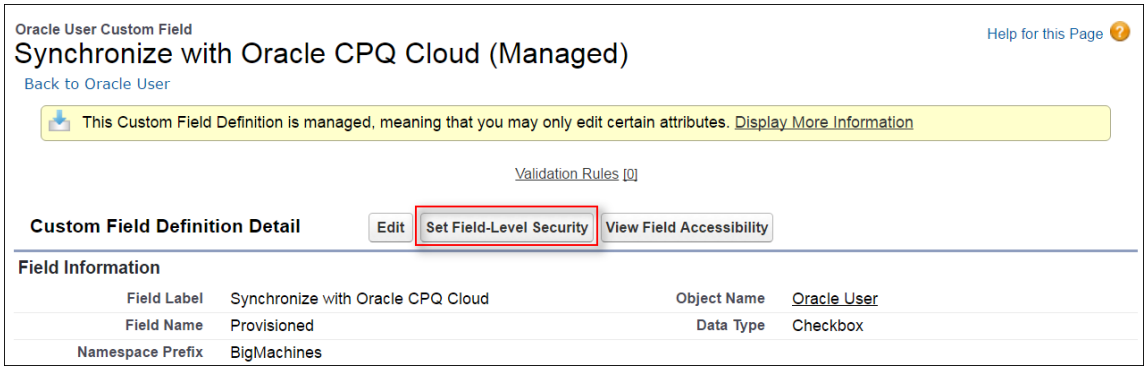



Figure 63: Synchronize with Oracle CPQ Cloud (Managed)

6. Click the checkbox under the **Read-Only** column for every profile that does not have the ability to provision CPQ Cloud users. Make sure the field is still editable by System Administrators. You do not need to check the box for users that cannot see the field.

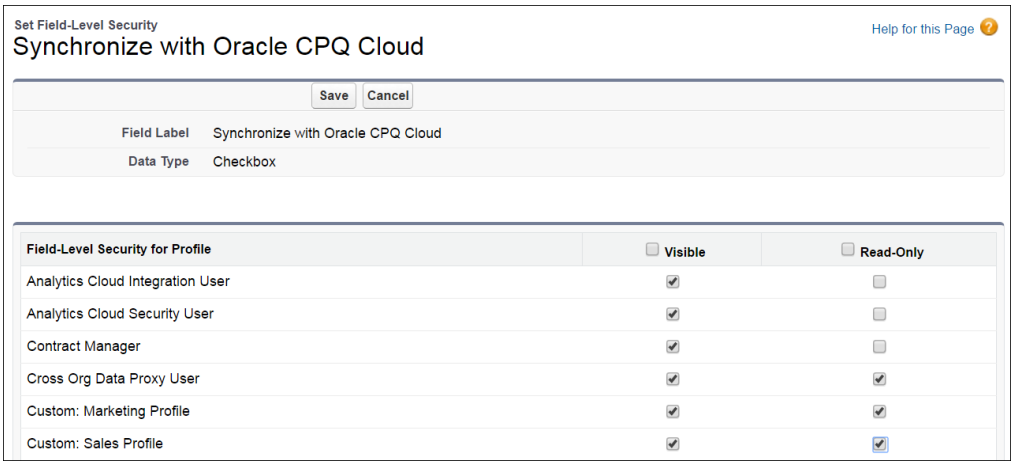



Figure 64: Set Field-Level Security

7. Click **Save**.

### Setting Default Values for User Fields Used in Provisioning

To make it easier to provision additional CPQ Cloud users, set default values for the CPQ Cloud fields. This has no impact on existing users, but saves time when creating additional users in the future. This is an optional step.

1. In Salesforce, navigate to **Setup**.
2. Navigate to **Build** > **Create** > **Objects** to open the Custom Objects page.
3. Click **Oracle User**.
4. Under **Custom Fields & Relationships**, click on the name of a field for which you want to set the default value. In the screenshots below, **Time Zone** was selected.
5. Click the **Edit** link next to the value you want to use as the default.

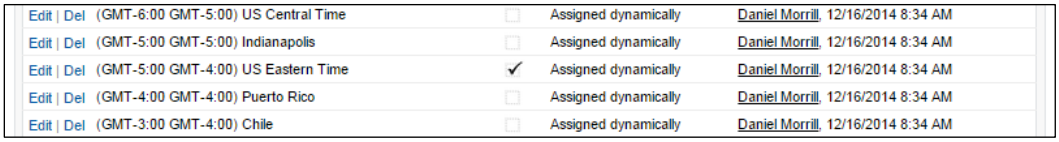



Figure 65: Set Default Values for User Fields Used in Provisioning

6. Select the **Default** checkbox and click **Save**.

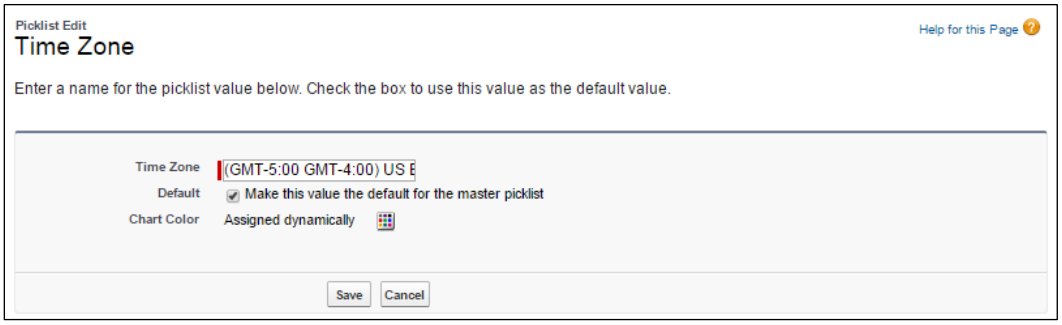



Figure 66: Picklist Edit

**Note:** Deleting any Picklist values other than the Standard user group is not recommended. If you do not want users to pick certain values, create additional validation rules.

### Adding a Partner Organization Field to an Account Page Layout

If you plan to provision Partner Organization users in CPQ Cloud, add an additional field to the page layout for any account that may display Partner Organization accounts. Customers may have or want a separate page layout for these accounts. This is an optional step.

**Note:** If you are not planning to provision Partner Organization users in CPQ Cloud, skip the below steps.

1. In Salesforce, navigate to **Setup**.
2. Navigate to **Build** > **Customize** > **Accounts** > **Page Layouts** to open the Account Page Layout page.
3. Click the **Edit** link next to the page layout you want to modify.

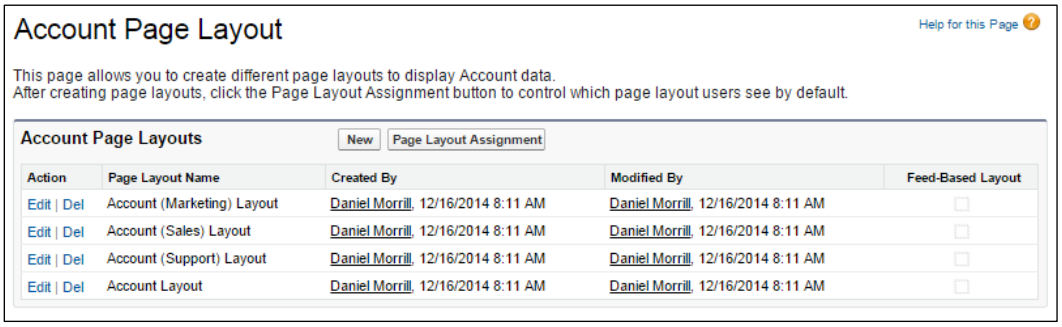



Figure 67: Account Page Layout

4. Add the **Oracle CPQ Partner Organization** field to the page layout and click **Save**.

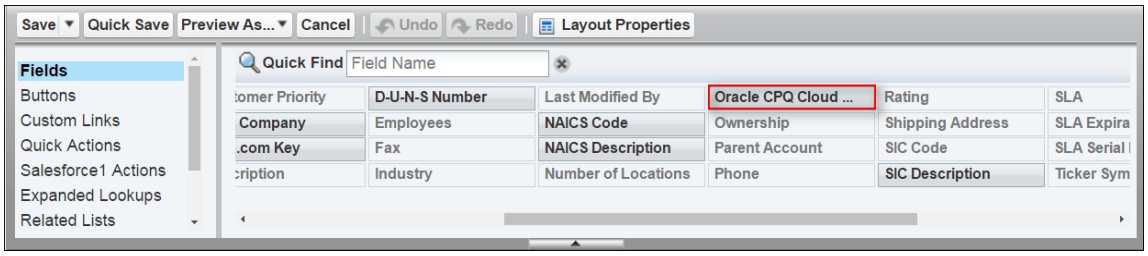



Figure 68: Add Oracle CPQ Cloud Partner Organization Field to Page Layout

## Setting Up Field Synchronization

CPQ Cloud can send any information from a Commerce transaction to Salesforce. Typically, CPQ Cloud updates the following items in Salesforce:

- Opportunities
- Opportunity products
- Quotes
- Quote products

While it is possible to update other objects in Salesforce, this type of customization is beyond the scope of this document.

The integration uses CPQ Cloud XSL files to update the custom objects that were installed from the Managed Package. The Managed Package then relies on Apex code to update other objects.

### Confirming XSL Files Are Correct

CPQ Cloud uses the Commerce process during Quote creation and must have the correct XSL files. In CPQ Cloud, navigate to Admin > Process Definition > Integrations and verify that your Integration XSL files match the files shown in the screenshots below. Also confirm the correct value is in the ID Field column. If you create new XSL files, set the value in the ID Field column to `quote_process.none` or create a new attribute for the ID Field.

| Name | ID Field | Description |
|---|---|---|
| SFDC Opportunity - Import | quote.sfOpportunityId_quote | Imports opportunity-level information such as opportunity name and stage. |
| SFDC User - Import | quote.none | Imports information about the SFDC user that is creating the quote such as name and phone number. |
| SFDC Quote - Upsert | quote.sfQuoteId_quote | Updates quote-level information such as quote total and description. Creates a quote object in Salesforce if one does not already exist. |
| SFDC Products - Upsert 200 | quote.sfProduct200Ids_quote | Creates a quote product in SFDC for the first 200 line items on the quote. |
| SFDC Products - Upsert 400 | quote.sfProduct400Ids_quote | Creates a quote product in SFDC for the second set of 200 line items on the quote. |
| SFDC Products - Upsert 600 | quote.sfProduct600Ids_quote | Creates a quote product in SFDC for the third set of 200 line items on the quote. |
| SFDC Products - Upsert 800 | quote.sfProduct800Ids_quote | Creates a quote product in SFDC for the fourth set of 200 line items on the quote. |
| SFDC Products - Upsert 1000 | quote.sfProduct1000Ids_quote | Creates a quote product in SFDC for the fifth and final set of 200 line items on the quote. |
| SFDC Quote - Process Updates | quote.sfQuoteId_quote | Tells SFDC that BigMachines is done sending updates and that the package should process and synchronize changes. |
| SFDC Attachment - Export | quote.sfOpportunityId_quote | Attaches a PDF of the quote to the SFDC object identified by this XSL's ID field. |

Figure 69: Name, ID Field, and Description of Default XSL Files

In CPQ Cloud, navigate to Admin > Accounts > Integration. Verify that your Account Integration XSL Files match the files in the screenshot below.

| Name | ID Field | Description |
|---|---|---|
| SFDC Account - Import | _customer_id | This integration is linked to the Auto Fill action in commerce. Auto Fill is run when the quote is created and when the Refresh button is clicked. You don't need to modify this XSL to do the mapping (mapping is done on the mapping tab in the auto-fill action), but you do need to modify it if you want to add fields to be mapped. This XSL determines what account fields from CRM can be mapped to BigMachines fields. |
| SFDC Contact - Import | none | This integration is linked to the Select Address action in commerce. Select Address runs when the Select Contact button is clicked. It is linked to the Select Contact action in commerce. You don't need modify this XSL to do the mapping, but you do need to modify it if you want to add fields to be mapped. This XSL determines what contact fields from CRM can be mapped to BigMachines fields. |

Figure 70: Verify Account Integration XSL Files

### Using XSL Files in the Commerce Process

The XSL files are used on the Integration tab of the Commerce action. Refer to the Reference Application for the correct XSL markup and the order in which to run the Integration XSL Files for each action.

**Note:** The order in which the Integration XSL files are defined within an action determines the order that the files are executed. Only adjust the order if you know how this will affect the dependencies in your XSL files.

### Default Field Synchronization

The default Integration XSL Files and Apex code update the following fields:

| Oracle CPQ Quote | Quote Product | Opportunity | Opportunity Product |
|---|---|---|---|
| **Name** | Name | Amount | Quantity |
| **Description** | Description | | Unit Price |
| **Status** | Quantity | | |
| **Total** | Sales Price | | |

Figure 71: Field Synchronization Defaults

### Additional Field Synchronization

To update other fields, update the appropriate XSL file in Oracle CPQ Cloud and evaluate whether you need to add Field Mappings to the site object you created in the *Setting Up the Oracle CPQ Cloud Site Object for a Salesforce Connection* section.

To modify an XSL file:

1. Go to the CPQ Cloud Admin Home Page.
2. Under Commerce and Documents, click **Process Definition.** The Processes page opens.
3. For the Commerce Process you want to integrate with Salesforce, select Integrations from the Navigation drop-down menu.
4. Click **List**.
5. Click on a file name. The Edit Integration page opens.

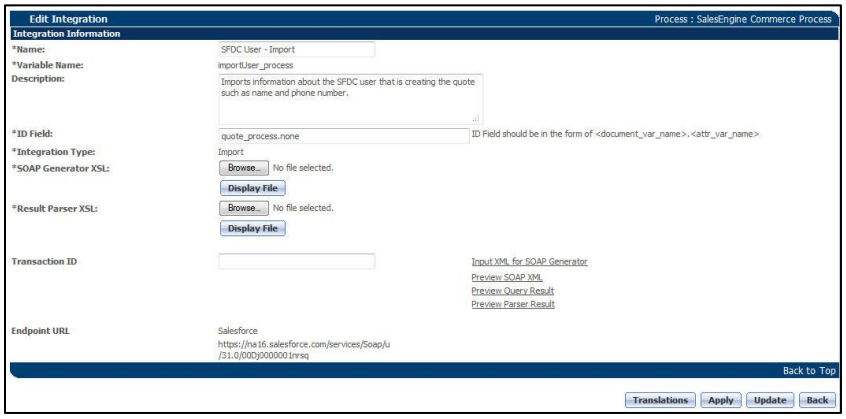



Figure 72: Edit Integration

6. Click **Display File** for both the SOAP Generator XSL and the Result Parser XSL.
7. Copy the content into a text editor, make your changes, and save the text document as an XSL file.
8. On the Edit Integration page, click **Browse.**
9. Select the edited file. The XSL file has now been updated.

**Note:** The Commerce process must be deployed before the changes take effect.

**Opportunity ID Mapping Field**

You can choose to populate the Opportunity ID Mapping field in CPQ Cloud. This field allows the Opportunity ID attribute in CPQ Cloud to be updated from Salesforce after the initial creation of the transaction, such as on the **Move** action. If this field is left blank, CPQ Cloud continues to use the previous method for updating the Opportunity ID attribute.

To modify the Opportunity ID Mapping field in CPQ Cloud, navigate to Admin > Process Definition. From the Navigation drop-down menu, select Documents. Then, click on the quote-level Document Name.

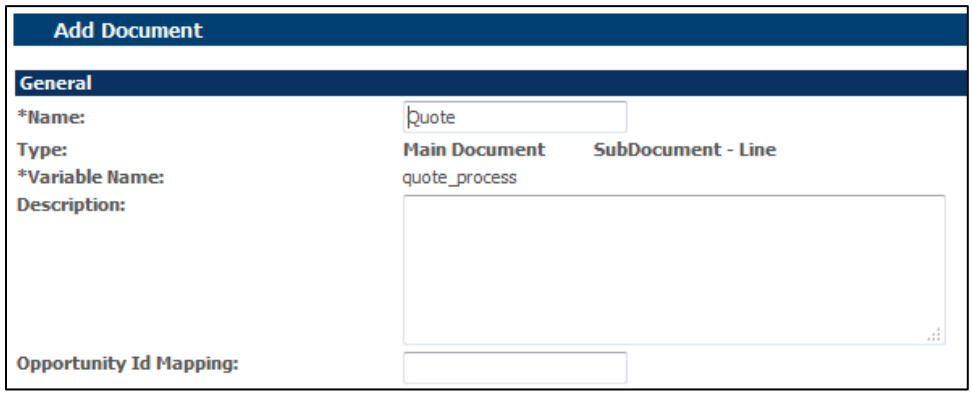



Figure 73: Modify Opportunity ID Mapping

**Note:** Upon populating the Opportunity ID Mapping field, you might also need to modify the SFDC Opportunity – Import XSL to ensure the attribute defined within this field is the same attribute being mapped to the Opportunity ID field within Salesforce.

## Setting up Products

Confirm that the parts you are adding to transactions in CPQ Cloud exist as products in Salesforce. The Managed Package includes a Products field in Salesforce called Oracle CPQ Part Number. The value of the Part Number field in CPQ Cloud must equal the value of the corresponding Oracle CPQ Part Number field in Salesforce.

If you run the CPQ Cloud Export Parts script, this field is updated for you. If you are working with a sandbox Salesforce Org implementation that already has the appropriate products in Salesforce, you must update the new Oracle CPQ Part Number field in Salesforce yourself.

The easiest way to update this field on existing Salesforce products is by completing the following steps:

1. Download the Salesforce Data Loader tool. Use this tool to download the product records.
2. Copy the associated part number into the CPQ Part Number field.
3. Re-upload the product records with the updated field.

## Confirming the Integration Is Set Up Properly

You are now ready to test the integration.

### Walking Through Typical Use Cases

In Salesforce, you should have the ability to create a quote and sync products from the quote back to Salesforce.

| Test Case | Description |
|---|---|
| **Create a Quote** | After creating an Account and an Opportunity, open the Opportunity and click **New Quote**.<br>Expected behavior: You are taken to Oracle CPQ. You can create and save a Quote. |
| **Create Quote Products** | In Oracle CPQ, save a Quote with line items.<br>Expected behavior: The correct, corresponding Quote Products are created in Salesforce. |
| **Edit a Quote** | In Salesforce, click the **Edit** link next to a Quote in an Opportunity or open a Quote and click **Edit**.<br>Expected behavior: You are taken to Oracle CPQ with the selected quote opened. |
| **Clone a Quote in an Opportunity** | Click the checkbox next to a Quote and then click **Clone**.<br>Expected behavior: You are taken to the clone process for that quote in Oracle CPQ. |
| **Clone a Quote outside an Opportunity** | For a Quote with no boxes checked, click **Clone**.<br>Expected behavior: You are taken to another screen in Salesforce that lists all Quotes. Choose a Quote and you are taken to the clone process for that Quote in Oracle CPQ. |
| **Set As Primary** | Select a non-primary Quote in Opportunity and set it as the Primary Quote.<br>Expected behavior: You stay in Salesforce, and the Quote you just selected is marked as primary. The Opportunity Products match the Products on the new Primary Quote. |
| **Quote Tab – Go to Oracle CPQ Quote tab.** | From Salesforce, navigate to the Oracle CPQ Quotes and Orders tab.<br>Expected behavior: You only see the **Change Owner** button, not the **New** button. The default view contains some relevant columns for the customer. Click the **Edit** link near the top of the page to confirm entries can be changed. |
| **Don't add Products** | In Salesforce, open a Quote.<br>Expected behavior: Confirm that you can't add a Product. You do not see the **New** button. |

Table 2: Typical Use Cases to Test

## Setting up Multiple CPQ Cloud Sites with One Salesforce Instance

If your organization does not have groups with separate CPQ Cloud instances that must integrate with the same Salesforce instance, skip this section and proceed to the section on *Setting Up Integrations with Multiple Commerce Processes on One CPQ Cloud Site*.

As of v6.0 of the Managed Package, organizations with multiple CPQ Cloud instances can integrate all CPQ cloud sites with a single Salesforce site. This allows each group to maintain separate CPQ Cloud environments while all Transactions are synced back to a common Salesforce instance.

Now that one CPQ Cloud site is integrated with Salesforce, you must complete the following additional steps to integrate additional CPQ Cloud sites with Salesforce.

1. Change the First Connected App's Name.
2. Create Additional Connected Apps for CPQ Cloud Sites.
3. Prepare Each CPQ Cloud Site.

**Note:** If you are upgrading to v7.0 of the Managed Package, you should perform the upgrade before attempting to integrate multiple CPQ Cloud sites with Salesforce. For upgrade instructions, refer to the Upgrading to Salesforce Commerce Integration Managed Package v7.0 section for upgrade instructions.

### Changing the First Connected App's Name

For simplicity when managing multiple CPQ Cloud integrations on a Salesforce site, name each CPQ Cloud connected app based on its CPQ Cloud site name. This means you should re-name the first connected app that was originally setup when implementing the initial integration with Salesforce, which was generically named "Oracle CPQ Cloud."

1. Log into Salesforce as an administrator.
2. Click **Setup** in the top-right corner of the page.

3. Navigate to **Build** > **Create** > **Apps** to open the Apps page.
4. Under Connected Apps, click **Oracle CPQ Cloud**.
5. Click **Edit**.
6. In the Connected App Name field, replace `Oracle CPQ Cloud` with a new, site-specific name for the CPQ Cloud site. For example: If the site's base URL is `techsolutionsna.oracle.com`, you might name the connected app "Tech Solutions NA."
7. Click **Save**.

### Create Additional Connected Apps for CPQ Cloud Sites

You must create a connected app in Salesforce for each CPQ Cloud site that must integrate with Salesforce.

1. Log in to Salesforce as an administrator.
2. Click **Setup** in the top-right corner of the page.

3. Navigate to **Build** > **Create** > **Apps** to open the Apps page.
4. Under Connected Apps, click **New** to open the New Connected App page.
5. Under Basic Information, enter a site-specific name for the CPQ Cloud site in the Connected App Name field. For example: If the site's base URL is `techsolutionsemea.oracle.com`, you might name the connected app "Tech Solutions EMEA." When you leave the field, the API Name field auto-populates.
6. Enter a contact email for the person in charge of maintaining the CPQ Cloud implementation.

**Note:** This email address should match the value entered in Salesforce for the Administrator Email in the Oracle CPQ Cloud Commerce Settings. For additional information, refer to the *Specifying Values for Oracle CPQ Cloud Custom Settings* section.

7. Under API (Enable OAuth Settings), check **Enable OAuth Settings**.

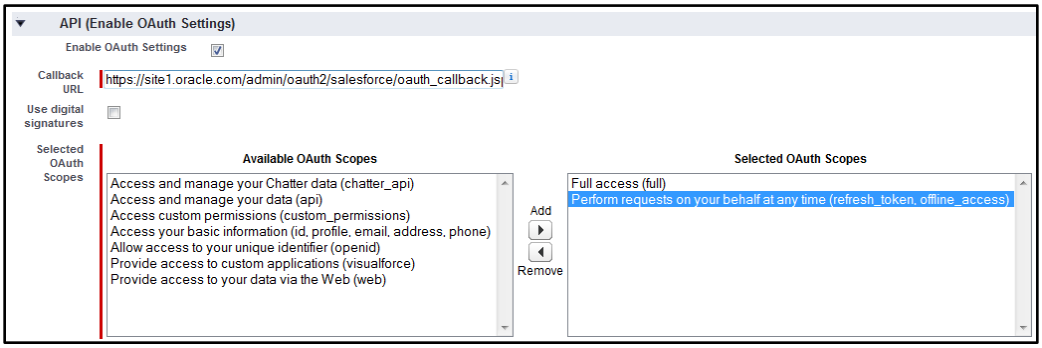



Figure 74: API (Enable OAuth Settings)

8. In the Callback URL field, enter the following:

   `https://[yoursite].com/admin/oauth2/salesforce/oauth_callback.jsp`

**Note:** [yoursite] is referring to the name of your CPQ Cloud site. For example: `site1.bigmachines` or `site1.oracle.`

9. Under Selected OAuth Scopes, add the following options:
   - Full access (full)
   - Perform requests on your behalf at any time (refresh_token, offline_access)
10. Under Canvas App Settings, select **Force.com Canvas**.

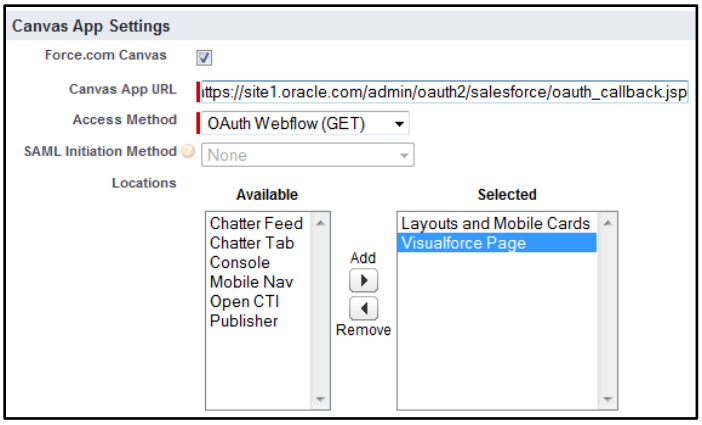



Figure 75: Canvas App Settings

11. For the Canvas App URL, enter the following:

    `https://[yoursite].com/admin/oauth2/salesforce/oauth_callback.jsp`

**Note:** [yoursite] is referring to the name of your CPQ Cloud site. For example: `site1.bigmachines` or `site1.oracle.`

12. Set the access method to `OAuth Webflow (GET)`.
13. Under Locations, add "Layouts and Mobile Cards" and "Visualforce Page."
14. Click the **Lookup** icon next to the **Lifecycle Class** field.
15. Enter `OracleOAuthLifecycleHandler` in the search field, then click **Go**.
16. Select OracleOAuthLifecycleHandler from the list of results.

**Note:** You must use the Apex Class Lookup to input the Lifecycle Class. If you enter the value in the field manually, the input is not saved.

17. Click **Save**, then click **Continue**.
18. Salesforce requires 2-10 minutes for the changes to take effect on their server.

### Creating a Service Request and Providing OAuth Integration Values

1. In Salesforce, navigate to **Setup**.
2. Navigate to **Build** > **Create** > **Apps** to open the Apps page.
3. Under Connected Apps, click the name of the app you created.
4. Copy the Consumer Key value and paste it into a document. You will need this value later in this procedure.
5. Click the **Click to reveal** link next to Consumer Secret to show the Consumer Secret value. Copy this value and paste it into a document. You will need this value later in this procedure.
6. Open a ticket on My Oracle Support that includes the Consumer Key and Consumer Secret values. In the ticket, include these requests:
    a. Enter the Consumer Key into the Salesforce Client Key field.
    b. Encrypt the Consumer Secret value.
    c. Enter the encrypted Consumer Secret value into the Salesforce Consumer Secret field.

**Note:** Before the integration will work in testing, My Oracle Support must fulfill the ticket. Continue with the rest of the implementation setup while waiting for the completion of your request. When the ticket is fulfilled, the Salesforce SOAP API used by CPQ Cloud is upgraded to version 31.

### Authorizing Profiles

1. In Salesforce, navigate to **Setup**.
2. Navigate to **Build** > **Create** > **Apps** to open the Apps page.
3. Under Connected Apps, click **Manage** next to the app you created.
4. Click **Edit**.
5. Under OAuth policies, select "Admin approved users are pre-authorized" from the **Permitted Users** drop-down list.
6. Click **Save**.
7. Under the **Profiles** section, click **Manage Profiles**.
8. Select all profiles that will use CPQ Cloud.
9. Click **Save**.

#### Setting up Remote Sites for CPQ Cloud Sites

You must create a remote site in Salesforce for each CPQ Cloud site you want to integrate with Salesforce. Complete the following steps for each CPQ Cloud site you want to integrate with Salesforce:

1. In Salesforce, navigate to **Setup**.
2. Navigate to **Administer** > **Security Controls** > **Remote Site Settings** to open the All Remote Sites page.
3. Click **New Remote Site**.

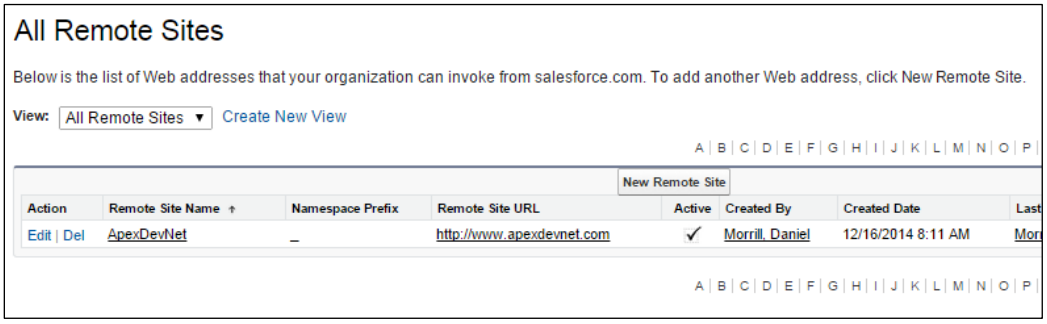



Figure 76: All Remote Sites

4. From the Remote Site Edit page, enter the CPQ Cloud site name and URL.
5. Click **Save.**

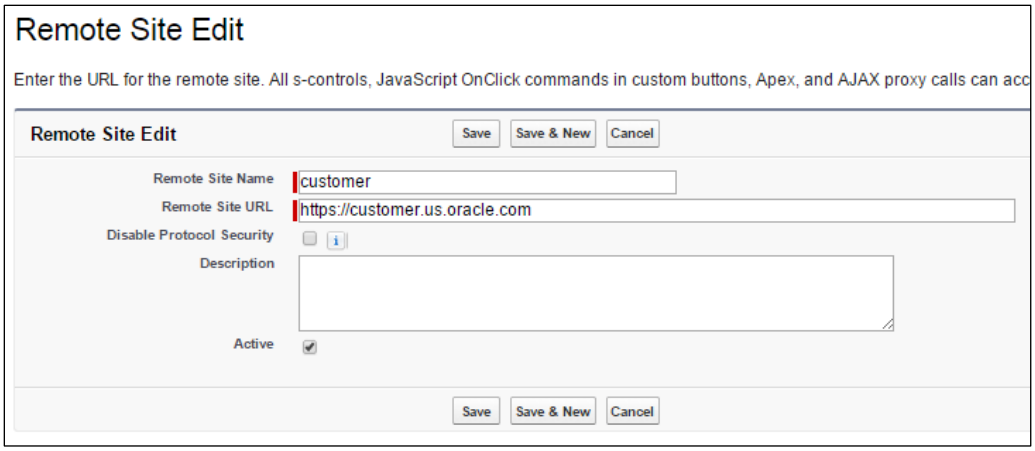



Figure 77: Remote Site Edit

**Note:** Create a remote site entry for each CPQ Cloud site. For example: Separate entries are needed for a test site and a production site. With these entries, you do not need to create a remote site entry each time you perform a sandbox refresh.

### Prepare Each CPQ Cloud Site

Ensure that the following steps are performed for each CPQ Cloud site you want to integrate with Salesforce.

#### Site Settings

In CPQ Cloud, a "Partner Login Server" property specifies the URL of the CRM system with which CPQ Cloud is integrating. Set this property to either the Salesforce Sandbox URL or the Salesforce Production URL. Open a ticket on My Oracle Support to request this change.

**Note:** Site properties are not overwritten when sites are copied. For example: When sites copied from Production to Sandbox, the site properties are not overwritten. If an integration worked in the past or any part of an integration is currently working, then the integration link is probably correct.

#### Web Services

Some features in the Salesforce Commerce Integration Managed Package rely on CPQ Cloud Web Services. To use these Web Services, ensure that their WSDLs are generated.

1. Log in to CPQ Cloud.
2. Go to the Admin Home Page.
3. Under Integration Platform, click **Web Services**. The Web Services Test pane opens.
4. Click **Generate Schema and WSDL**. A list of CPQ Cloud Web Services displays.
   The **Last Modified** column indicates if the WSDL was deployed. If yes, the date and time of the last deployment displays.
5. Click **Generate** in the desired row to generate the WSDL for that web service.

**Note:** To take advantage of the User Management functionality in CPQ Cloud, generate both the Users and the Security WSDLs.

### Add a Site ID to SFDC Quote - Upsert SOAP Generator XSL Files

Since multiple CPQ Cloud sites will be sending SOAP calls to the same Salesforce endpoint, a Site ID must be added to the SFDC Quote - Upsert SOAP Generator XSL Files of each CPQ Cloud site that must be integrated with Salesforce. Do the following steps for each CPQ Cloud site that must be integrated:

1. Log in to CPQ Cloud as a Full Access user.
2. Click **Admin** to go to the Admin Home Page.
3. Under Commerce and Documents, click **Process Definition.**
4. For the Commerce Process that must integrate with Salesforce, select **Integrations** from the Navigation drop-down.
5. Click **List**.
6. Click the **SFDC Quote – Upsert** integration to open it.
7. Under SOAP Generator XSL, click **Display File**. A page of XML that contains XSL opens.
8. Right-click within the new tab and then click **View Page Source**. The exact wording of this option may vary depending on the browser you are using. An XML file that contains XSL opens in a new tab.
9. Right-click in the new tab and click **Save as**. The exact wording of this option may vary depending on what browser you are using. A Save As window opens.
10. Save the XML file somewhere you can access it. We recommend making a copy of this file before you start making changes. If mistakes are made in the process of making changes, you then have a clean backup.
11. Navigate to the XML file you saved and open the file in a text editor.
12. Locate the `<sObjects>` tag in the XSL.
13. Enter `<Site__c>{SiteID}</Site__c>` as a new line somewhere in between the `<sObjects>` opening and closing tags, where `{SiteID}` is the Site ID of the CPQ Cloud site in Salesforce. Follow the steps below to find the Site ID of a CPQ Cloud site in Salesforce:
    a. In Salesforce, navigate to **Setup**.
    b. Click the **Oracle CPQ Cloud Site Setup** tab.
        i. If the Oracle CPQ Cloud Site Setup tab isn't visible, click the **All Tabs** icon (➕).
        ii. On the All Tabs page, click **Oracle CPQ Cloud Site Setup**.
    c. Click the name of the site that corresponds to the CPQ Cloud site in order to open it.

       The CPQ Cloud Site administration page opens.
    d. The Site ID is within the URL of this page—between `id=` and `&sfdc`.

       For example, if the URL is: `https://cpq1.force.com/apex/SiteView?id=b01560000001oBDAUY&sfdc.override=1`, the Site ID would be `b01560000001oBDAUY`.

       Copy the Site ID from the URL and add it to the XML file.

```
<!-- ********************************** MODIFY START ************************
<sObjects xmlns="urn:sobject.partner.soap.sforce.com">
    <Site__c>b01560000001oBDAUY</Site__c>
    <type>BigMachines__Quote__c</type>
    <Name><xsl:value-of select="$main_doc/quoteNumber_quote"/></Name>
    <BigMachines__Transaction_Id__c><xsl:value-of select="$bmTransId"/></BigMachin
    <xsl:if test="string-length($main_doc/crmOpportunityId_quote) = 15 or string-l
        <BigMachines__Opportunity__c><xsl:value-of select="$main_doc/crmOpportunit
    </xsl:if>
    <BigMachines__Account__c><xsl:value-of select="$main_doc/_customer_id"/></BigM
    <BigMachines__Description__c><xsl:value-of select="$main_doc/quoteDescription_
    <BigMachines__Status__c><xsl:value-of select="$main_doc/status_quote"/></BigMa
    <BigMachines__Total__c><xsl:value-of select="$main_doc/total_quote"/></BigMach
    <BigMachines__Pricebook_Id__c><xsl:value-of select="$main_doc/_partner_price_b
    <BigMachines__Prep_Sync__c>true</BigMachines__Prep_Sync__c>
</sObjects>
<!-- ********************************** MODIFY END ****************************
```

14. Once the Site ID is added, save the XML file.
15. Go back to the window where the SFDC Quote – Upsert integration is open in CPQ Cloud. If you closed the window or your session expired, follow steps 1-5 to reopen the integration in CPQ Cloud.
16. Under SOAP Generator XSL, click **Choose File**. The exact wording of this button may vary depending on what browser you are using. An open window displays.
17. Navigate to the XML file you modified, select the XML file, and then click **Open**.
18. Click **Update** to save the integration.
19. Deploy the Commerce Process.

### Overriding Oracle User Custom Field Pick List Values in Salesforce

A CPQ Cloud site that is integrated with Salesforce can override the Oracle User custom field values in Salesforce. When editing a CPQ Cloud field that corresponds to an Oracle User custom field value in Salesforce, the CPQ Cloud admin is shown a list of default values with a checkbox for each value. When selected, the corresponding value is used as the default for new Oracle Users rather than the default set on the Oracle User field in Salesforce.

## Setting up Integrations with Multiple Commerce Processes on One CPQ Cloud Site

If your organization does not need to integrate multiple Commerce Processes on the same CPQ Cloud site with the same Salesforce instance, skip this section and proceed to the *Installing the Managed Package on Production* section.

Organizations can integrate multiple Commerce Processes on the same CPQ Cloud site with the same Salesforce instance. Since CPQ Cloud users are shared by all Commerce Processes on the site, this feature allows a single set of CPQ Cloud users (rather than multiple sets of users who are each from a separate CPQ Cloud site) to create quotes that sync back to Salesforce while still maintaining different pricing and document options via separate Commerce Processes.

One of the Commerce Processes that is integrated with Salesforce must be marked as the "Primary Commerce Process," meaning that Oracle Users are created for it and synced between CPQ Cloud and Salesforce. Since there is only one set of CPQ Cloud users in this type of integration, only one Commerce Process can and must be the "Primary Commerce Process."

**Note:** If you are upgrading to v7.0 of the Managed Package, perform the upgrade before attempting to integrate multiple CPQ Cloud Commerce Processes with Salesforce. For upgrade instructions, refer to the *Upgrading to Salesforce Commerce Integration Managed Package v7.0* section.

### Creating Site Objects for the Additional Commerce Processes

Create a CPQ Cloud site object in Salesforce for each CPQ Cloud Commerce Process that integrate with Salesforce. Complete the following steps for each CPQ Cloud Commerce Process that will integrate with Salesforce:

1. Log in to CPQ Cloud as a Full Access user.
2. Click **Admin** to go to the Admin Home Page.
3. Under Commerce and Documents, click **Process Definition**. The Processes page opens.
4. In the **Navigation** drop-down menu for the Commerce process that will integrate with Salesforce, select **Integrations.**
5. Click **List**.
6. Click **View Parameters** at the bottom of the page. A set of values display. You will enter these values in Salesforce in subsequent steps. Keep this tab open or copy the values into a new document.

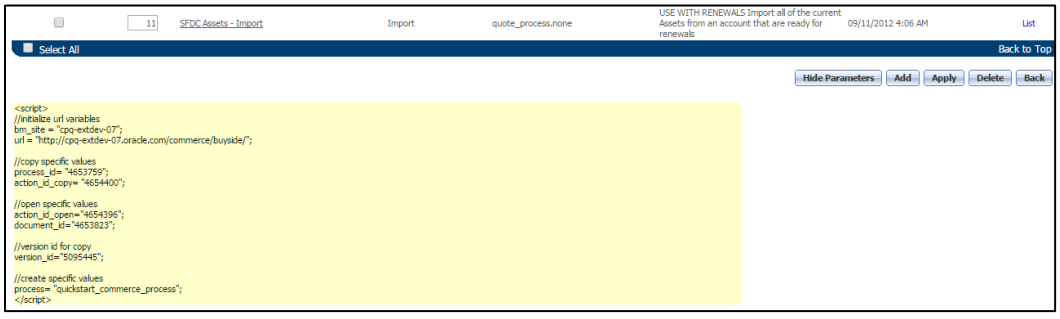



Figure 78: Integration Parameters

7. In Salesforce, navigate to **Setup**.

8. Click the **Oracle CPQ Cloud Site Setup** tab.
    a. If the Oracle CPQ Cloud Site Setup tab is not visible, click the **All Tabs** icon (➕).
    b. On the All Tabs page, click **Oracle CPQ Cloud Site Setup**.
9. Click **New**.

Figure 79: Oracle CPQ Cloud Site Setup

10. Enter the values from the View Parameters section of the CPQ Cloud Integrations page into the corresponding fields on the Oracle CPQ Cloud Site Edit page.

**Note:** If your values have URLs with oracle.com instead of bigmachines.com, enter the full URL in the field instead of just the site's name space.

To take advantage of the User Management functionality, enter the login credentials for the CPQ Cloud Full Access user that will create and manage users. The only requirement for this user is that they have "Permission to create/modify users" checked in their CPQ Cloud profile.

Customers often either create a user that is only used for the integration, or use the "superuser" user. For more information, refer to the *Updating Salesforce Profile Permissions* section.

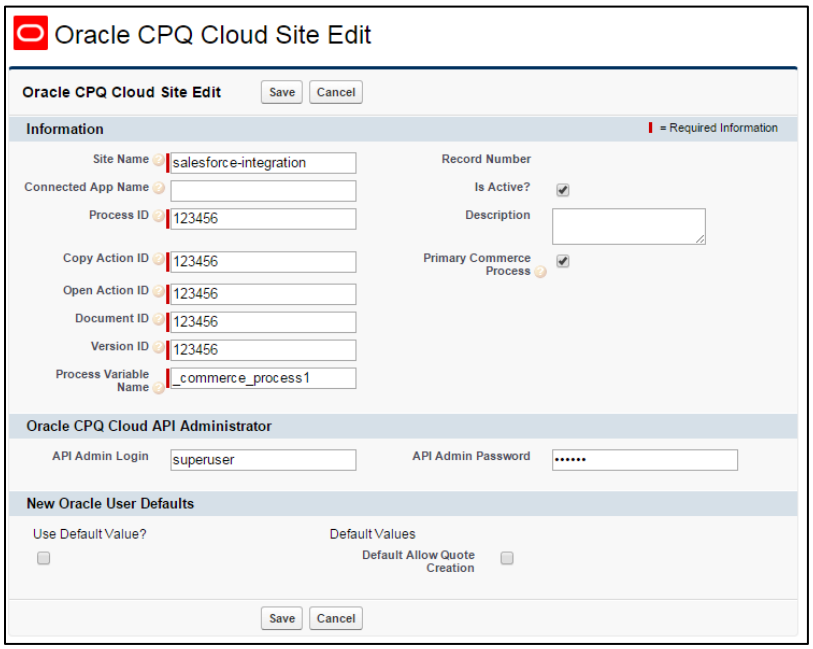



Figure 80: Oracle CPQ Cloud Site Edit

11. If you want the Commerce Process to be the Primary Commerce Process on a site, leave **Primary Commerce Process** selected. You may need to unselect this option on a different CPQ Cloud site object—there should never be more than one Primary Commerce Process with the same Site Name.

If the Commerce Process will not be the Primary Commerce Process on a site, unselect **Primary Commerce Process**. You may need to select this option on a different CPQ Cloud site object—there must always be one Primary Commerce Process.

12. Click **Save**. The **New Field Mapping** button appears.
13. Click **New Field Mapping** and select the objects that will be mapped and what fields will be mapped between them. For example: You may want Quote object fields mapping to Opportunity object fields. For more information about mapping, see your Salesforce documentation.

    The required fields for each object have pre-defined mappings, so you do not need to create any mappings for the integration to work. In addition to creating mappings for your custom fields, you may choose to create mappings for other standard (non-custom) fields.

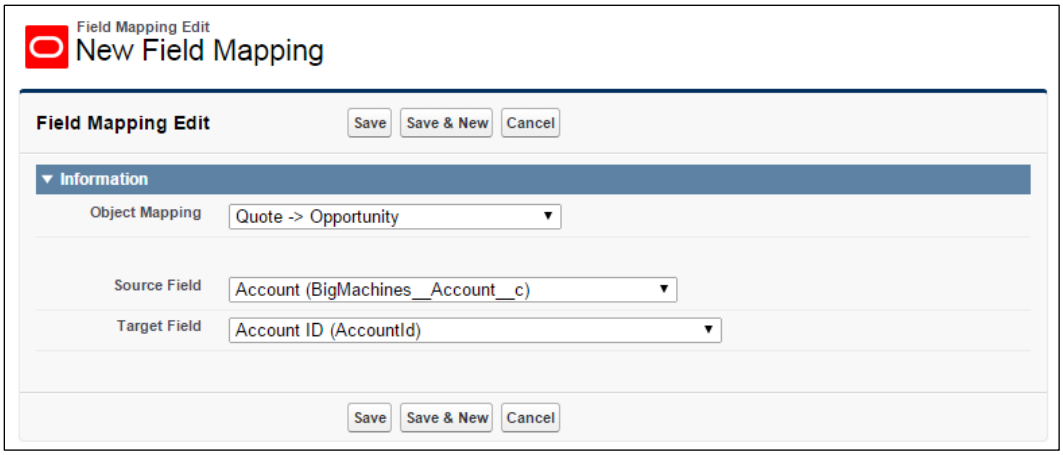



Figure 81: Field Mapping Edit

You may want to test the basic integration first before adding any field mappings. If so, come back to this step later.

**Note:** You may want to test the basic integration first before adding any field mappings. If this is the case, come back to this step later.

14. Click **Save**. Setting up Users for the Remote Site Objects

Complete the following user setup steps for each new Remote Site Object that you created for Commerce Processes on the CPQ Cloud site:

1. Creating Oracle CPQ Cloud Login Credentials for User Syncs in Salesforce
2. Modifying a User Page Layout to Display Oracle CPQ Cloud Fields
3. Creating User Groups in Salesforce
4. Limiting Who Can Provision Oracle CPQ Cloud Users
5. Setting Default Values for User Fields Used in Provisioning
6. Adding a Partner Organization Field to an Account Page Layout

**Note:** Since some values are shared with the Primary Commerce Process, the user administration page in Salesforce (Setup > Manage > Users > Select a User) has less options for non-primary Commerce Processes.

## Installing the Managed Package on Production

The steps for installing the Managed Package on the CPQ Cloud production site are exactly the same as the steps for installing on a sandbox or development environment.

As described below, installing a Managed Package as opposed to migrating a Managed Package has some benefits and is therefore recommended.

| Migration | Installation |
|---|---|
| **The Installed Package's entry is not created or updated, so you cannot easily see what version you have migrated. Therefore, you cannot determine the appropriate documentation.** | The Installed Package's entry is created and updated, so you can easily see what version you are on. You can easily reference the appropriate documentation. |
| **You must get all the Apex tests in your destination environment to pass.** | It is not necessary to get all the Apex tests in your destination environment to pass. |

Table 3: Migration vs. Installation

**Note:** You can develop your own customizations on top of the package and migrate these enhancements using Eclipse. However, you must first install the Managed Package in your production site before you can migrate the enhancements or updates. You cannot migrate them together.

## Using and Administering the Managed Package

Basic instructions on how to use and administer the Salesforce Commerce Integration Managed Package are provided below.

### Synchronizing an Internal User with Oracle CPQ Cloud

There are several fields on the user object in the Managed Package. While most of them map to fields on the Oracle CPQ User Profile, only a few are required to synchronize users.

**Note:** CPQ Cloud requires a first name for a user while Salesforce does not. Include a first name when creating users that will sync with CPQ Cloud. These users are not part of a Partner Organization. For more information about synchronizing partner users, refer to the *Synchronizing a Partner User with Oracle CPQ Cloud* section.

1. In Salesforce, navigate to **Setup**.
2. Navigate to **Administer** > **Manage Users** > **Users** to open the All Users page.
3. Click a User Name.
4. Click **Edit**.
5. In the **Oracle CPQ Cloud User Information** panel, set the value of **Association to Organization** to `Internal User`.
6. Supply a value for **Access Type**.
7. You may want to supply a value for the User fields listed below, but it is not required.
   - Currency Preference
   - Date Time Format
   - Language
   - Number Format
   - Time Zone
   - Unit System
   - User Groups
8. Check the **Synchronize with Oracle CPQ** checkbox to provision the user in CPQ Cloud.

Several things happen in CPQ Cloud after a user is provisioned in Salesforce.

1. Salesforce determines if a user exists in CPQ Cloud with a login equal to the value of Oracle CPQ User Login (BigMachines__Login__c).
2. If this login is found, Salesforce confirms the CPQ Cloud user is active. If the user is not active, Salesforce creates the CPQ Cloud user.
3. Salesforce updates the Partner Login field with the username of the current user and updates all the other fields specified above on the CPQ Cloud user profile.

### Synchronizing a Partner User with Oracle CPQ Cloud

Before you create a Partner user in CPQ Cloud, follow these steps:

1. In CPQ Cloud, an administrator must create the Partner Organization to which the Partner User will belong. You will use this variable name later in Salesforce.
2. In Salesforce, go to the Partner User's account.

3. Set the value of the Oracle CPQ Partner Organization field to the value of the variable name of the corresponding Partner Organization in CPQ Cloud.
4. Set the value of the Association to Organization field to `Partner User`.

From here, creating a Partner User is the same as creating an internal user.

#### Synchronizing Multiple Users with Oracle CPQ Cloud Simultaneously

To take advantage of the bulk synchronization feature, use the Salesforce Data Loader.

1. Download all the Salesforce users you want to provision in CPQ Cloud.
2. Select all the **Oracle CPQ Cloud** fields and set their values.
3. Set both **Provisioned in Oracle CPQ** and **Bulk Synchronization** fields to **True**.
4. Upload the users back to Salesforce.

   **Caution:** When updating any CPQ Cloud-related user fields using the Data Loader, set **Bulk Synchronization** to **True**. Otherwise, you might get an error from Salesforce that you have exceeded Governor Limits.

   Salesforce created Governor Limits because all customers share the same system resources. To ensure that other customers do not experience a lag in performance when one customer tries to use a lot of system resources, Salesforce limits the amount of resources any customer can use at any one time.

   When you don't set **Bulk Synchronization** to True, Salesforce will send a separate API call to CPQ Cloud for each user as they are updated. If the flag is set to True, Salesforce will batch all the users into a single message request, which greatly reduces resource usage.

Once the users are re-uploaded in Salesforce, follow these steps.

1. In Salesforce, click the **Plus** sign on the top row of tabs.
2. Click **Oracle CPQ Site Setup**
3. Select the site for which you want to provision users.

   The page will tell you the number of users marked for bulk synchronization.
4. Click **Bulk Synchronize** and wait for the page to refresh. A message appears either indicating the operation was a success or providing an explanation for each user that failed.

#### Setting Up Delegated Approvers in Oracle CPQ Cloud

Before you can select a user to be a delegated approver, that user must exist in CPQ Cloud. In the case of a single user, provision the delegated approver first, and then provision the user whose items need approval. For example, the Delegated Approver field for UserA is UserB, so UserB must be provisioned in CPQ Cloud before UserA.

To bulk synchronize multiple users, do one bulk synchronization to get all the users into CPQ Cloud, and then a second bulk synchronization to set the Delegated Approver field of those users. The second bulk synchronization would follow the same steps as the first synchronization, but you would set the Delegated Approver field to true for the users that should have that setting.

### Allowing Users to Edit or Approve Quotes Created by Another User

To edit or approve quotes that were created by a different user, the approver must have edit permission over those objects in Salesforce. To grant this permission, create sharing rules.

1. In Salesforce, navigate to **Setup**.
2. Expand the **Security Controls** list under **Administration**.
3. Click **Sharing Settings**.
4. At the top of the page, select **Oracle Quote** from the **Manage sharing settings for:** drop-down list. The screen displays Organization-wide defaults for the quote object and for sharing rules.
5. To create a sharing rule, click **New** next to **Oracle Quote Sharing Rules**.
6. Follow the wizard and click **Save**.

## Upgrading to Salesforce Commerce Integration Managed Package v7.0

Upgrading to Managed Package to v7.0 from another version will not modify any of your organization's data or any of the work performed to set up and customize the previous Managed Package. When you upgrade, all of your permissions, page layouts, field mappings, and everything else you have modified remain the same.

**Note:** Existing quotes and users are synchronized with the primary CPQ Cloud site upon upgrading the Managed Package.

### Upgrading from Managed Package v6.0 to v7.0 Prerequisites

Before starting the upgrade, ensure that a CPQ Cloud site in Salesforce is marked as "Is Primary" on the site administration page. If an active site does not exist at the time of the upgrade, the upgrade fails and an email is sent to the primary administrator.

### Upgrading the Managed Package

Use the following links to access version 7.0 of the Salesforce Commerce Integration Managed Package:

- Sandbox Edition - Salesforce Commerce Integration Managed Package Version 7.0.1
- Developer Edition, Professional Edition, Enterprise Edition, Unlimited Edition - Salesforce Commerce Integration Managed Package Version 7.0.1

### Installation Notes

- When a Salesforce login screen opens, log in as the Salesforce user described in the *Confirming the Salesforce User and Environment* section.
- When the Install Oracle CPQ Commerce Integration page opens, enter `Commerce7` in the Password field.

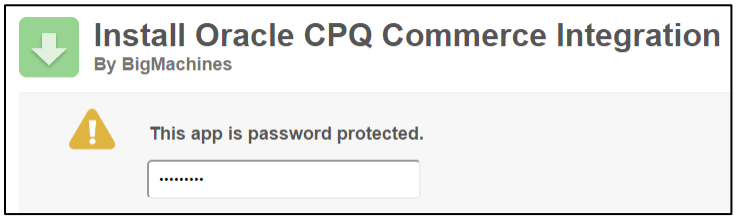



Figure 82: Install Oracle CPQ Cloud Commerce Integration

### Security Settings

We recommend selecting **Install for All Users**. This gives Salesforce users access to fields in Salesforce that make it possible to access CPQ Cloud.

**Note:** Profiles in Salesforce contain restrictions. Some data is only editable by entering Edit mode while other data is only editable by entering View mode. By selecting **Install for All Users**, making changes to editable data in View mode is not necessary. However, you still may want to modify data that is editable in Edit mode. For additional information, refer to the *Updating Salesforce Profile Permissions* section.

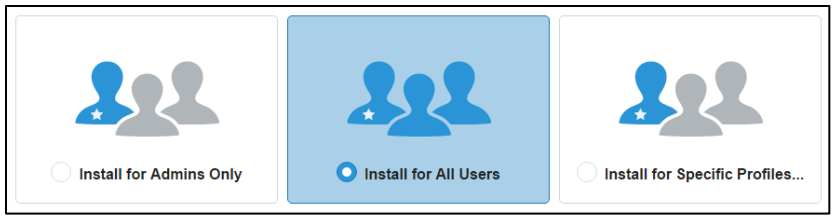



Figure 83: Security Settings

### Install Managed Package

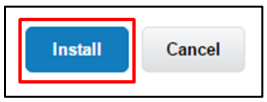
Before creating a Managed Package, all testMethods associated with the package must pass. This package was no exception, and all of its testMethods passed.

When you install a Managed Package in any environment, Salesforce gives you the option of running all your testMethods, including those that already exist in your environment and are not part of the Managed Package. If any of the new or existing testMethods fail, Salesforce notifies you and stops the installation. You will then have to repeat all of the previous steps.

Therefore, the recommended approach is to ignore any of these failures while installing the Managed Package.

At any time, you can log in to Salesforce, navigate to **Setup** > **Build** > **Develop** > **Apex Classes**, and click **Run All Tests** to see if there are any Apex failures.

1. Click **Install**.




The installation may take a few moments. When the installation is complete, an "Installation Complete!" message displays. You will also receive an email notification when the installation completes.

2. Click **Done** to go to the **Installed Packages** page.

#### Post-Upgrade Tasks

Once the upgrade is installed, perform the following tasks:

- Complete the tasks in the *Populating the Lifecycle Class Field* section.
- Review the Oracle CPQ Cloud 2016 R1 Resolved Known Issues document.
- Complete the tasks in the Opportunity ID Mapping Field section.
- Complete the tasks in the Using XSL Files in the Commerce Process section.
- Complete the tasks in the *Modifying Page Layouts* section below.
- Optional: Complete the tasks in Table 2: Typical Use Cases to Test. Table 2: Typical Use Cases to Test

- Setting up Multiple CPQ Cloud Sites with *One Salesforce Instance* section.
- Optional: Complete the tasks in the *Updating Icons and Text to Reflect Your Upgraded Oracle Integration* section.

#### Modifying Page Layouts

In v6.0 of the Managed Package, a custom object for Oracle Users was created and the custom fields on the standard Salesforce User object were deprecated. Remove the deprecated fields from the User layout, and add a new Visualforce page to it.

### Removing the Deprecated Fields

1. Navigate to **Setup** > **Build** > **Customize** > **Users** > **Page Layouts**.
2. Edit the page layouts that are being used, which are most likely Oracle CPQ User Layouts.
3. Click the **minus (-) icon** for the **Oracle CPQ Cloud User Information** section.
4. Click **Save**.

### Adding the New Visualforce Page

1. Navigate to **Setup** > **Build** > **Customize** > **Users** > **Page Layouts**.
2. Edit the page layouts that are being used, which are most likely Oracle CPQ User Layouts.
3. Click **Visualforce Pages** in the **Fields** list in the upper-left corner.
4. Drag **View Oracle Users** onto the page layout.
5. Click **Save**.

#### Applying Field-Level Security Settings to Oracle Users

If field-level security settings for User fields have ever changed for one or more profiles to prevent the profile from accessing the field, the same field-level security settings must be applied to the new Oracle User fields.

To make the necessary changes in Salesforce, navigate to **Setup** > **Build** > **Customize** > **Users** > **Fields** > **User Custom Fields** > ***Custom Field Name*** > **Set Field-Level Security**.

#### Updating Icons and Text to Reflect Your Upgraded Oracle Integration

This step is optional and only applies to organizations upgrading from v4.x to v7.0 of the Managed Package or organizations that skipped this step when upgrading to v5.0 of the Managed Package.

Upgrading to Managed Package v7.0 does not automatically replace all of the BigMachines logo icons seen by end users in Salesforce or references to BigMachines in the hover text for a custom field.

To maintain brand consistency between logo icons and text referring to CPQ Cloud, replace the BigMachines logo icons with Oracle logo icons and text by completing the following tasks:

### Changing BigMachines Icons to Oracle Icons

1. Open the Salesforce Integration Online Help topic (you must be logged into CPQ Cloud as a Full Access user to access the Help content).
2. Under **Related Topics**, right click on **The Oracle logo** and select **Save Link As**. **The** exact wording may differ depending on the browser you are using.
3. Choose a local location to save the file `OracleCPQCloudLogo.png` file and then click **Save**.
4. In Salesforce, click the **Plus** sign on the top row of tabs.
5. Click **Documents**.
6. Click **Create New Folder.**
7. Enter `Oracle CPQ Cloud Documents` for **Document Folder Label**.
8. Place the cursor in **Folder Unique Name** so that the field auto-populates to `Oracle_CPQ_Cloud_Documents`.
9. Click **Save**.
10. Click **New Document**.
11. Enter `Oracle CPQ Cloud Logo` for **Document Name**.
12. Place the cursor in **Document Unique Name** so that the field auto-populates to `Oracle_CPQ_Cloud_Logo`.
13. Ensure that **Oracle CPQ Cloud Documents** is selected for **Folder**.
14. Click **Choose File.** The button name may vary based on the browser you are using.
15. Navigate to where you saved the `OracleCPQCloudLogo.png` file and select the file.
16. Click **Open.** The button name may vary based on the browser you are using.
17. Click **Save**.
18. Click **Setup**.
19. Click **Installed Packages** under **Build**. The Installed Packages page appears.
20. Click **Oracle CPQ Commerce Integration.**
21. Click **View Components.**
22. Click the **Oracle CPQ Cloud Site** tab (make sure **Tab** is in the **Type** column, since there may also be a Custom Object with the same name).
23. Click **Edit.**
24. Click the **search icon** next to Tab Style.
25. Click **Create your own style**.
26. Click **Insert an Image**.
27. Select **Oracle CPQ Cloud Commerce Documents** from the **File Location** drop-down menu.
28. Click **Go.**
29. Select the **Oracle CPQ Cloud Logo** image.
30. Click **OK**.
31. Click **Save** on the Custom Tab Definition Edit page.
32. Repeat steps 23-32 for each of the following tabs:
    a. Oracle Quote
    b. Oracle Quotes and Orders (VF)

### Changing Text

Text swapping is only applicable for Help Text on custom fields. There is no exhaustive list of these fields. You must find the fields individually.

1. In Salesforce, navigate to **Setup**.
2. Navigate to **Build** > **Create** > **Objects**. The Custom Objects page opens.
3. Click the label of an Object.

**Note:** Focus on the objects with an **Installed Package** listing of Oracle CPQ or BigMachines.

4. Scroll to the **Custom Fields & Relationships** section.
5. Click **Edit** next to the field you want to examine.
6. In the Custom Field Definition, replace "BigMachines" in the **Help Text** field with "Oracle CPQ Cloud".
7. Click **Save**.
8. Repeat the previous two steps for each custom field in that object.
9. Navigate to the next custom object and repeat these steps for each custom field in that object.

## Appendix A: Frequently Asked Questions

This appendix includes a list of frequently asked questions and the associated answers.

1. Does Managed Package v7.0 support the ability to synchronize multiple price books? Does it support the ability to synchronize multiple currencies?

   Yes, both are possible.

   Limiting one currency per price book is not a valid workaround to the above requirements.

   Some customers may want to use multiple currencies but calculate the value of those currencies using a conversion factor instead of setting individual currency values for each part. For these customers, sync only to the base currency. The above requirements are not necessary.

   See the *Establishing a Parts Master* section. No other functionality depends on which system is the Parts Master.

2. What can and cannot be modified in a Managed Package? If I have very specific integration requirements, should I use a different Managed Package?

   You cannot modify the metadata of a Managed Package. Even though the v7.0 Managed Package is managed, it is still very flexible. Many requirements are customizable through the UI. Please discuss requirements with your CSA or CPQ Cloud Product Management to determine how to implement it with v7.0 or make an enhancement to the Managed Package to support the request.

   Specifically, you cannot modify the Apex Classes, Apex Triggers, Custom Buttons, Custom Fields, or Visualforce Pages that are part of a Managed Package. You can create your own custom fields and custom buttons. You have complete control over what is displayed on a standard page layout.

   Since the Managed Package uses standard page layouts for Quotes and Quote Products, creating a custom button and placing that button on the page layout instead of the button that came with the Managed Package is the best way to add highly customized behavior to the Managed Package. Between the ability to create custom buttons and the editable settings that are part of the Managed Package, you should have the ability to meet most requirements.

3. How do I translate the contents of this Managed Package into other languages?

   This Managed Package is currently not set up for translation.

4. How do I change the label of a custom object or custom field that is part of a Managed Package?

   Labels for custom objects and custom fields in Managed Packages are locked down. You cannot change custom objects and custom fields directly; however, you can override their values. To do so, navigate to Setup > Translation Workbench > Override in Salesforce. From this screen, you can override any labels in the Managed Package.

   If you want to override the label for the Quote object, make updates in the following two places:

   - Web Tab
   - Custom Field – Quote Object – Related List Label

5. I get errors when I run all the Apex Tests. Will this cause issues with my implementation? How can I fix these errors?

   The failure of Apex tests included with the Salesforce Commerce Integration Managed Package does not indicate any failure with the Managed Package functionality. The only reliable indication of functional issues with the Managed Package are to walk through the scenarios in the *Walking Through Typical Use Cases* section and see if the behavior is as expected.

   If a customer does not have the same setup in their environment as CPQ Cloud has in its development environment, Apex Test may fail. For example: The customer environment may have additional required fields on standard objects that are not present in the CPQ Cloud development environment. The customer environment may also have additional validation rules on these objects. Other differences may include the values of Custom Settings, the existence of additional Apex Triggers, or the enablement of additional features such as multi-currency.

   Unfortunately, customers cannot update the Apex tests included with the CPQ Cloud Managed Package. In addition, CPQ Cloud cannot tailor the tests for one customer without impacting all of their other customers.

   If tests that come from an Aloha-Enabled Managed Package are failing, this does not prevent customers from uploading other Apex code. Generally speaking, customers cannot upload new Apex code when any tests fail. Aloha Managed Packages are an exception. Currently, Salesforce does not provide a way to hide, exclude, or remove failing tests that belong to an Aloha Managed Package. CPQ Cloud cannot change or remove these tests due to the code coverage requirements. There are a few tests that are included in the Salesforce Commerce Integration Managed Package that are likely to fail for the majority of CPQ Cloud customers. CPQ Cloud had to create unusual scenarios in the development environment to test corner cases – to provide the coverage for the code that deals with these cases.

   Salesforce is aware of the confusion that the current behavior causes and is considering an enhancement that would allow partners to indicate any test they believe might fail in an environment.

6. I cannot install the Managed Package. I get the following error, “Missing Organization Feature: Quote__c.Sharing”. What does this error mean and how do I fix it?

   This issue is caused by a snippet of code in Salesforce that does not pay attention to object name space. We have reported this to SFDC. Since the issue is not that common and the work around is not complex, the case was closed.

   This issue occurs when trying to install the Salesforce Commerce Integration Managed Package in a Salesforce instance that already contains a custom object that meets both of the following conditions:

   - The variable name excluding namespace of the object is “Quote__c”
   - The object’s organization-wide default sharing is set to “Public Read/Write”

   Changing either of these conditions resolves the problem. The following are a couple of examples of how to resolve the issue.

   - Delete the existing Quote object.

- Change the variable name of the existing Quote object. This breaks any code that is a SOAP integration that reference the object.
- Change the object's organization-wide default sharing to "Public Read Only" or "Private." To do this, in Salesforce go to Setup > Security Controls > Sharing Settings in Salesforce. Click **Edit** next to Organization-Wide Defaults and change the Default Access value in the drop down list next to the Quote object.

7. Can mobile approvers (e.g. users that wish to approve quotes with their mobile devices) use this Managed Package to provision their CPQ Cloud users?

   Yes, with OAuth, mobile approvers can respond to Quotes and their response will sync back to Salesforce.

8. Can Salesforce users create user groups in CPQ Cloud? Can Salesforce users create partner organizations in CPQ Cloud?

   See the section *Creating User Groups in Salesforce* for more information.

   Currently, User Groups and Partner Organizations are manually maintained in CPQ Cloud. CPQ Cloud does not have an API for creating or maintaining either of these objects.

   Creating User Groups is more of a design-phase decision and is not likely to happen during day-to-day usage. If your company works with a large number of partners, you may have to create partner organizations frequently.

9. Why did CPQ Cloud duplicate so many user fields inside Salesforce instead of using the fields that were already there? Is there an easy way to populate these fields?

   Salesforce has many of the same user fields as CPQ Cloud. The possible values for these fields are often different. Instead of guessing what customers wanted in the areas where there are differences and creating a hard-coded mapping of fields, CPQ Cloud decided to take the more flexible route and allow customers to decide. For most customers, this is a one-time setup cost. We do not anticipate that these values will change frequently.

   The easiest way to populate all these fields is to download all the users via the Salesforce Data Loader. You can then populate the values you want in Excel and load the data back into Salesforce.

10. When I check the Provisioned in CPQ Cloud flag on the User page and hit Save, I do not see an error. After refreshing the page, the field is unchecked and the user is not provisioned in CPQ Cloud. Why is this happening and how do I fix it?

    Use Bulk Synchronization to copy users from CPQ Cloud to Salesforce. A good troubleshooting technique is to set the Bulk Synchronization flag to true on the user you are trying to provision and then go to the Oracle CPQ Site object and attempt to bulk synchronize the single user.

    Before bulk synchronizing the user, click **Check Connection**. Your issue is possibly with the connection. If not, then when you click **Bulk Synchronize**, an error message displays on the screen that contains the user-specific error that you are encountering.

## Appendix B: Troubleshooting Guide

The following is a list of common issues and the associated resolution.

1. *Some of my users cannot see the Oracle CPQ Quote object on their opportunities. What did I do wrong?*

   There are two reasons why users might not see the Quotes object on their opportunities. First, the user might not have the correct profile permissions. For more information, see Updating Salesforce Profile Permissions. Second, the user is possibly using a page layout that does not have the Quote object on it. For more information, see the section *Adding the Quote List to an Opportunity Page Layout*.

2. *When I click **Save** I get the following error: "insufficient access on cross reference id." How do I get around this error?*

   There are a few reasons why this error might occur. Although the user has permission to edit the quote in CPQ Cloud, the user does not have permission to edit the quote in Salesforce. This might happen when a user edits a quote that he or she did not create. To fix this issue, share the quote with the user. For more information, refer to the *Allowing Users to Edit or Approve Quotes Created by Another User* section.

   Another possibility is that the user is modifying a quote that is connected to another object to which the user does not have access. The same rules apply here as with the quote. Make sure the user has the ability to see and edit any object in Salesforce that the user is trying to edit in CPQ Cloud. You may have to create sharing rules for these other objects just as you did for the quote.

3. *When I try to Bulk Reconcile Users, I get the following error: There was an error while trying to sync users with CPQ Cloud. Please check that the CPQ Cloud site is listed in Setup > Administration Setup > Security Controls > Remote Site Settings.*

   Check that the site is listed in the Remote Site Settings area of Salesforce. For more information, see the *Setting up Remote Sites section*.

   Another possibility is that the WSDLs for the appropriate CPQ Cloud Web Services were not generated or were not regenerated since the last upgrade. For more information, see the *Web Services* section.

4. *After our Salesforce Sandbox environment was refreshed from our Production environment, users in the Sandbox environment received an error saying that the "Connected App cannot be found" when attempting to open CPQ Cloud within the Salesforce. How do I fix this?*

   Rename the Connected App using a different name. Make sure to change the corresponding name in the CPQ Cloud Site.

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Oracle CPQ Cloud Salesforce Commerce Integration Managed Package Implementation Guide

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