

Chapter 1 Vlocity Matrixx Integration



Installation and Configuration Guide

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Chapter 2 Vlocity Matrixx Integration

This document tells you how to configure the Vlocity Matrixx integration, an unmanaged package that enables you to use the Vlocity Telcom package with Matrixx to handle billing and customer interaction. The Vlocity Matrixx integration provides a basic level of functionality that you can customize to support your business requirements. The instructions in this document assume that you are familiar with Matrixx, Salesforce, and Vlocity administration and configuration.

Chapter 3 Installing and Configuring the Integration

Install the unmanaged package containing the Vlocity Matrixx integration, then upload and activate the Matrixx Integration MultiPack (the Vlocity DataPack containing the integration procedures and DataRaptor bundles required by the integration).

To configure the integration, and perform the following steps in Salesforce.

1. Edit the Named Credential for your Matrixx URL.
2. Edit the Remote Site Settings for the Matrixx site URL.
3. To make the integration layouts visible to the intended users, go to Setup > Manage Users Profiles and, for each profile, choose Edit Assignment and enable the following layouts:
 - Account (Vlocity GoDigital)
 - Product (Vlocity GoDigital)
 - Asset (Vlocity GoDigital)

Note: If Account is a required field in your Contact layout, you must modify the Contact layout so that Account is not a required field. Accounts are linked to Contacts using the Account object's PersonContactId__c field.

Create Custom Settings

To create the custom settings required by the integration, perform the following steps in Salesforce.

1. From Setup, use the Quick Find box to navigate to Custom Settings.
2. Choose General Settings and add the following settings:
 - Name: EnableProcedureDebug: Determines whether integration procedures run in debug mode. Set to "true" during development and "false" for production. Must be lower case.
 - Name: RatingSystem: Set to "Matrixx".

Configure the Service Sharing Type Options

To expose the Account object ServiceSharingType picklist values, perform the following steps in Salesforce:

1. From Setup, use the Quick Find box to navigate to Account.
2. On the Account page, navigate to Record Types.
3. For each record type you will be using, choose Service Sharing Type > Edit and move the “Individual” and “Group” values from Available Values to Selected Values.

Configure Notification Preferences

To configure notification preferences, you must make matching entries in Salesforce and Matrixx. First, list the notification preferences you want to support, and assign a bitmap value to each. For example:

- Email: 1
- SMS: 2
- Facebook: 4
- Telephone: 8

To configure the Salesforce settings, edit the Account object ContactPreferences picklist, as follows:

1. In Setup, use the Quick Find box to navigate to Custom Metadata Types.
2. Go to Notification Type, then Manage Records.
3. Create an entry for each type of preference you want to support. Specify settings as follows:
 - Label: Short descriptive name for the preferences (for example, "Email").
 - Notification Type Name: Must be identical to Label.
 - Value: The bitmap value to be used by Matrixx.

In Matrixx, edit the Notification Preferences bitmap to match the entries that you created in Salesforce.

Configure Status, Bill Frequency, and Contact Preferences Options

In Salesforce, configure the Status, Billing Cycle, and Contact Preferences picklists for the Account and Asset (device) objects as follows:

1. Edit the Status picklist values so that they correspond to the statuses you use in Matrixx.
2. Edit the Billing Cycle picklist values so that they correspond to the statuses you use in Matrixx.
3. For Contact Preferences, modify the DataRaptor bundles, using the Transform Map Values feature to map Vlocity picklist values to the corresponding bitmap position in Matrixx.

Install Integration Procedures

This integration procedures required for the Vlocity/Matrixx integration are distributed in a zip file named Matrixx Integration Multipack <date>.zip. To install the installation procedures:

1. Unzip the multipack.
2. Go to the Integration Procedure Designer and import the DataPack files from the unzipped multipack.

Some of these integration procedures access external data using Salesforce external objects. For more information, see the [Salesforce external object documentation](#).

Sync Products

To sync Vlocity Product2 with Matrixx ProductOffers/CatalogItems, define the following link:

```
Product2.ProductCode = ProductOffer.ExternalId
```

Create Field Mappings

Using (Vlocity) Field Mapper, edit the Order Product and Asset objects and create the following field mappings. Field mappings are one-way, so you must edit both the Order Product and Asset objects and define these mappings for each object.

Order Product	Asset
SerialNumber	SerialNumber
AlternateSerialNumber__c	AlternateSerialNumber__c
OrderItem.PricebookEntry.Product2.IsNetworkDevice	IsNetworkDevice
Quote Line Item *	Opportunity Product
Order Product **	Quote Line Item

* Optional if using opportunities and quotes

** Optional if using quotes

Chapter 4 Fields Added to Standard Salesforce Objects

The following tables list the fields that the Matrixx integration adds to standard Salesforce objects.

Account

Label	API Name	Type	Comments
Create External Data	CreateExternalData__c	Boolean	If left unselected, no external data is created in the Account trigger insert method. Enabled by default.
Global Key	GlobalKey__c	Text (255) External ID, Unique Case-sensitive	Populated by ATG Account trigger and sent to Matrixx as ExternalId. External objects use this key in indirect lookups on parent accounts.
Rating System Key	RatingSystemKey__c	Text(80) External ID	ObjectId returned by Matrixx
Service Sharing Type	ServiceSharingType__c	Picklist	Group or Individual (Subscriber). Required by the Account trigger

Asset

Field	API Name	Type	Description
Serial Number	SerialNumber	Text(80)	The new device phone number, if the asset is a device
Alternate Serial Number: (Also on OrderItem, Opportunity Line Item, Quote Line Item)	AlternateSerialNumber__c	Text (255)	The new device IMSI, if the asset is a device
GlobalKey	GlobalKey__c	Text (255) External ID Unique Case-sensitive	Populated by ATG Asset trigger and passed to Matrixx for use as their ExternalId.
Rating System Key	RatingSystemKey__c	Text(80) External ID	ObjectId returned by Matrixx
IsNetworkDevice	IsNetworkDevice__c	Boolean	TRUE if device, FALSE (default) if offer

Chapter 5 Layout Details

The following sections describe fields of particular interest in the layouts included with the integration.

Account

Field	Description
Service Sharing	Indicates subscriber or group account
Person Contact Id	Associates subscribers with contact details.
Phone	Subscriber phone number. If you are creating subscribers without contact details (so-called “burner phones”), the Account.Phone field must be populated.
Global Key	The unique key for the account, generated by Vlocity and passed to Matrixx.
Rating System Key	The Matrixx object Id returned after a subscriber or group is created
Contact Preferences	Contact preferences must be mapped to Matrixx bitmap values.
Status	Vlocity CMT account status

Product (Vlocity GoDigital) Layout

The Is Network Device field distinguishes a device (handset) from an offer.

Asset (Vlocity GoDigital)

Field	Description
Is Network Device	Same meaning as product.
Serial Number	The device phone number.
Alternate Serial Number	IMSI, which Matrixx requires for a device.

These fields are populated in the Asset record when it is created from the order line item, according to the field mappings you defined above.

Chapter 6 Triggers

The following sections describe the table triggers that are added by the integration.

Accounts

The ATG Account Trigger inserts, updates, and deletes Subscriber or Group records. It also controls moving subscribers into and out of groups.

To delete a subscriber or group:

1. Edit its Account and set the Account.Status__c to Deleted. (Changing the status triggers an event that is sent to Matrixx.)
2. Delete the Account.

The subscriber or group is automatically deleted in Matrixx.

Assets

The ATG Asset Trigger inserts, updates, and deletes assets (devices or offers). To delete either a device or an offer, set the Asset.Status to Deleted.

Contact

An update to a Contact record triggers an update of the corresponding Matrixx Subscriber record.

PurchasedItem

An insert to a PurchasedItem record triggers a topup call to Matrixx.