

CPQ Cloud-ATG Commerce Integration

Implementation Overview

Oracle CPQ Cloud Product Management
March 2015

ORACLE®

**CONFIGURE, PRICE,
AND QUOTE
CLOUD**

ORACLE®

ATG WEB COMMERCE

Disclaimer

The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described for Oracle's products remains at the sole discretion of Oracle.

CPQ Cloud-ATG Commerce Integration Overview

Integrating with CPQ Cloud gives ATG customers an advanced quoting engine and automated approvals processes. The integration allows CPQ Cloud users to add direct sales workflows to Web Commerce shopping carts.

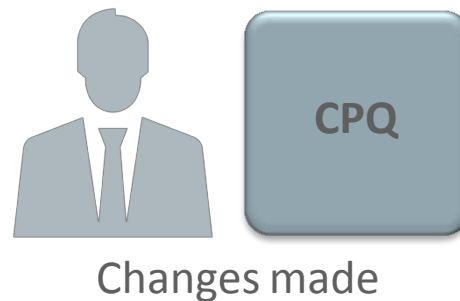


Sample Quote Life Cycle (1 of 3)

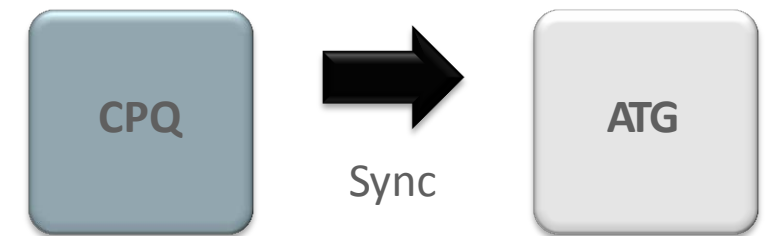
1. Transaction exists in ATG. The customer requests a quote, and the Transaction is opened in CPQ Cloud.



2. CPQ Cloud sales rep works on the Transaction.

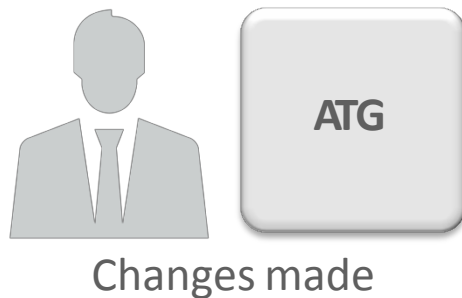


3. Changes made to the Transaction in CPQ Cloud are synced back to ATG.

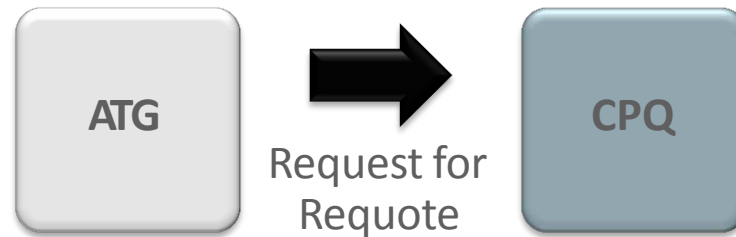


Sample Quote Life Cycle (2 of 3)

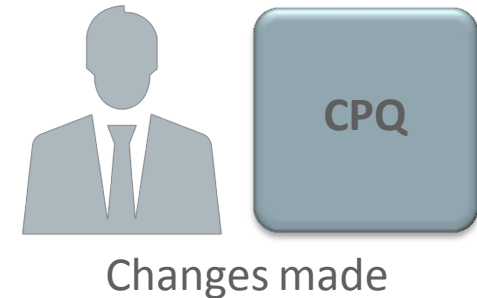
4. ATG user works on the Transaction.



5. ATG user requests a requote and the Transaction moves back to CPQ Cloud.



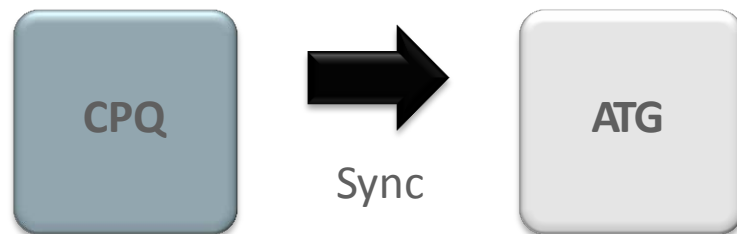
6. CPQ Cloud sales rep works on the Transaction.



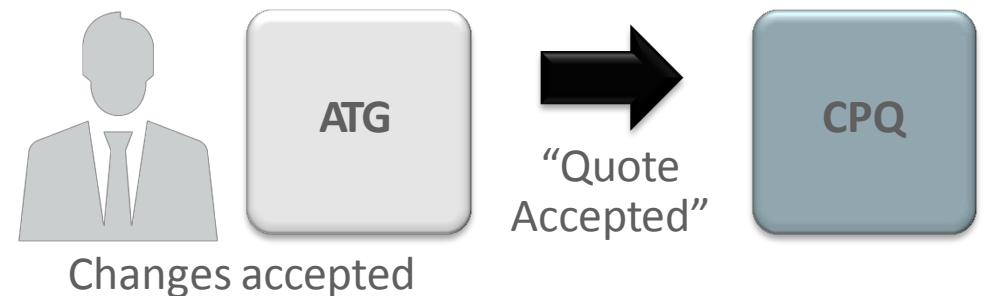
Sample Quote Life Cycle (3 of 3)

7. Changes made to the Transaction in CPQ Cloud are synced back to ATG.

Note: Transactions can be modified and synced between applications as many times as necessary.



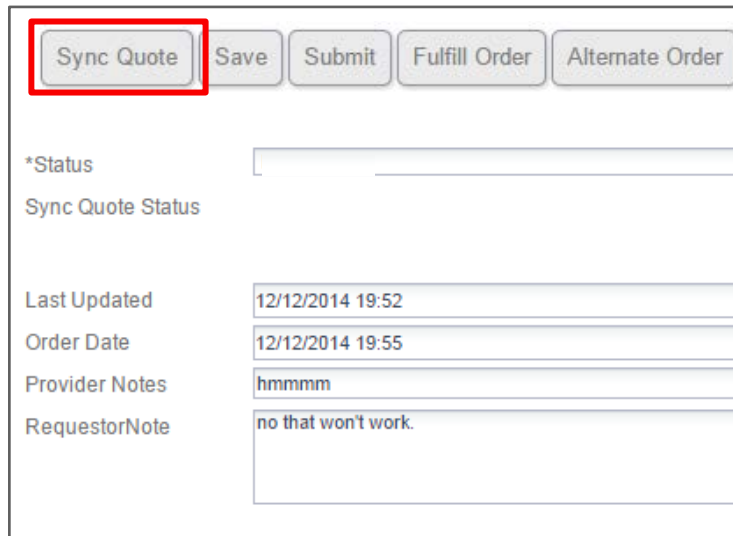
8. The ATG user accepts the changes and ATG sends CPQ Cloud a "Quote Accepted" status.



User Experience

Syncing Transactions

After modifying the Transaction and getting approvals, the CPQ Cloud sales rep has the option to sync the Transaction to ATG.



The screenshot shows a user interface with a row of buttons: 'Sync Quote', 'Save', 'Submit', 'Fulfill Order', and 'Alternate Order'. The 'Sync Quote' button is highlighted with a red box. Below the buttons, there is a form with the following fields:

*Status	
Sync Quote Status	
Last Updated	12/12/2014 19:52
Order Date	12/12/2014 19:55
Provider Notes	hmmmm
RequestorNote	no that won't work.

Responding to Changes

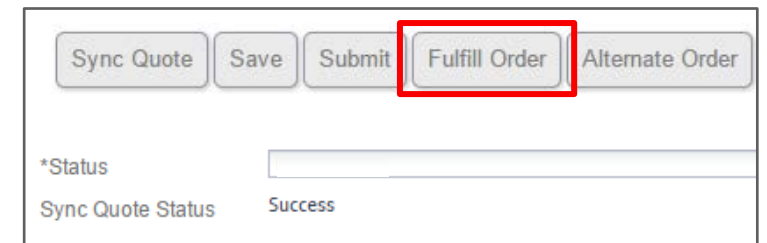
After the sync to ATG has taken place, the ATG user will review the changes and either:

- **Accept:** The order can now be fulfilled either by ATG or CPQ Cloud.
- **Reject:** No further processing takes place.
- **Requote Request:** Step transition takes place taking the Transaction back to the "In Progress" step.

Fulfilling Orders

If a Transaction has been accepted, an order can be fulfilled either by ATG or CPQ Cloud.

Note: CPQ Cloud must be integrated to fulfillment in order to fulfill an order. To make this possible, "Fulfill Order" and "Cancel Order" functionality has been added to CPQ Cloud.

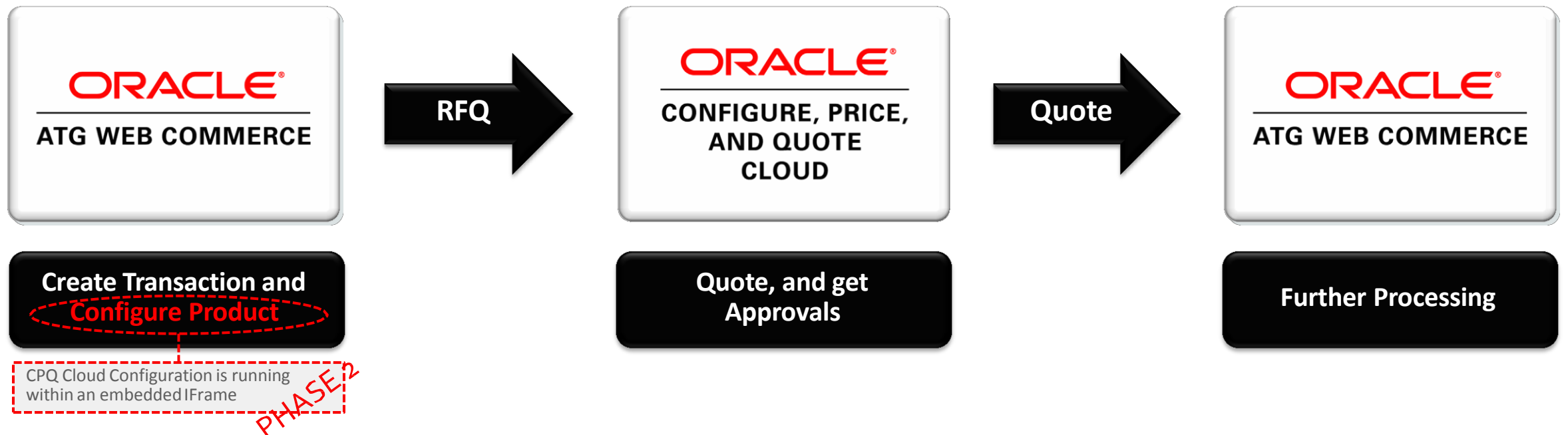


The screenshot shows a user interface with a row of buttons: 'Sync Quote', 'Save', 'Submit', 'Fulfill Order', and 'Alternate Order'. The 'Fulfill Order' button is highlighted with a red box. Below the buttons, there is a form with the following fields:

*Status	
Sync Quote Status	Success

CPQ Cloud-ATG Commerce Integration—Phase 2 (coming)

- This document describes what is possible and what must be created to implement phase one of the CPQ Cloud-ATG Commerce Integration. Phase two of the integration will enable CPQ Cloud Configuration to be done within the ATG Commerce interface in an embedded IFrame.



Preparing ATG Commerce for Integration

ATG REST Web Services used in CPQ Cloud Integration

getSessionNumber

Returns the session id

loginUser

Logs the user in to the session and provides user identity



completeQuote

Commerce web service to send the entire Transaction from CPQ Cloud to ATG

logoutUser

Logs the user out from the session

Preparing CPQ Cloud for Integration

Prerequisites

- CPQ Cloud version 2014 R2 or later
- Base Reference Application is deployed on the environment
 - Customers with QuickStart sites can still perform the integration, but many integration files will need to be manually modified. Contact CPQ Cloud Product Management for more information.

CPQ Cloud Components to Create for ATG Integration

- 6 Attributes
- 5 Actions
- 3 Library Functions
- 11 Step Transitions (Transition Rules)
- 2 Data Tables

Note: This document gives a high-level overview of what must be created in CPQ Cloud to enable integration with ATG Commerce, but it does not include detailed instructions for how to create each component.

Refer to the White Paper on CPQ-ATG Integration for detailed administration instructions.

Preparing CPQ Cloud for Integration

Attributes

Attribute	Description
Order Number	Auto-filled by the payload sent to CPQ Cloud from ATG when a Transaction is created.
Agent ID	Identifies who is making changes to the Transaction. Filled manually by the CPQ Cloud sales user while modifying the Transaction.
Provider Notes	Filled out by the CPQ Cloud sales user and then sent to ATG during a sync to elaborate on the changes that were made to the Transaction.
Sync Quote Status	Shows the status of a sync to ATG using HTML. Status will be either "Success," "Cancelled," or "Fulfilled." Errors are displayed in red and can include "Quote with given OrderID has already been synced" and "Invalid SessionID/Session Number used for login." The value of this field cannot be used in action.
QuoteStatusNonHtml	Does not appear on the layout. Holds the status of a sync to ATG. The value will either be "Success" or there will be no value. This value can be used in rules or actions.
SyncQuotePayload	Does not appear on the layout. Contains the Transaction data that is sent to ATG during a sync.

Transaction Details
Customer Details
Pricing Details

Transaction Name	Oracle Commerce	Owner	
Transaction ID	36305735	Created Date	16/01/2015
Order Number	o50003	Last Updated By	
Version	1	Agent ID	23456
Customer Company Name		*Status	Quoted
Customer First Name		Sync Quote Status	Success
Customer Last Name		Last Updated	16/01/2015 12:07
		Provider Notes	Gave 5%
		RequestorNote	

Preparing CPQ Cloud for Integration

Actions

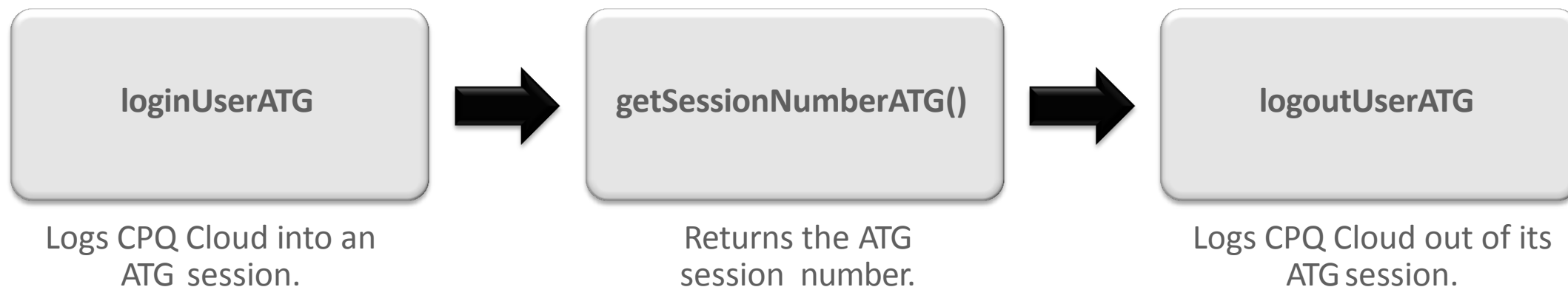
Action	Description	Present on the CPQ Cloud Layout	Button
Sync Quote	Sends Transaction data from CPQ Cloud to ATG.	Yes	Sync Quote
Create Order	Creates an order.	Yes	Create Order
Fulfill Order	Fulfills an order after it has been created.	Yes	Fulfill Order
Cancel Order	Cancels an order after it has been created.	Yes	Cancel Order
Cancel Quote	Used by ATG to cancel a Transaction.	No	NA
Reject Quote	Used by ATG when Transaction changes are rejected.	No	NA
Save Quote	Used by ATG when Transaction changes are accepted.	No	NA
Request for Requote	Used by ATG to request for changes to be made to the Transaction.	No	NA

Order-related actions do not need to be created if order creation and fulfillment will take place in ATG Commerce and not in CPQ Cloud.

Preparing CPQ Cloud for Integration

Library Functions

Three new Library Functions must be created and will run each time the **Sync Quote**, **Fulfill Order**, and **Cancel Order** actions are fired.



Preparing CPQ Cloud for Integration

Step Transitions (Transition Rules)

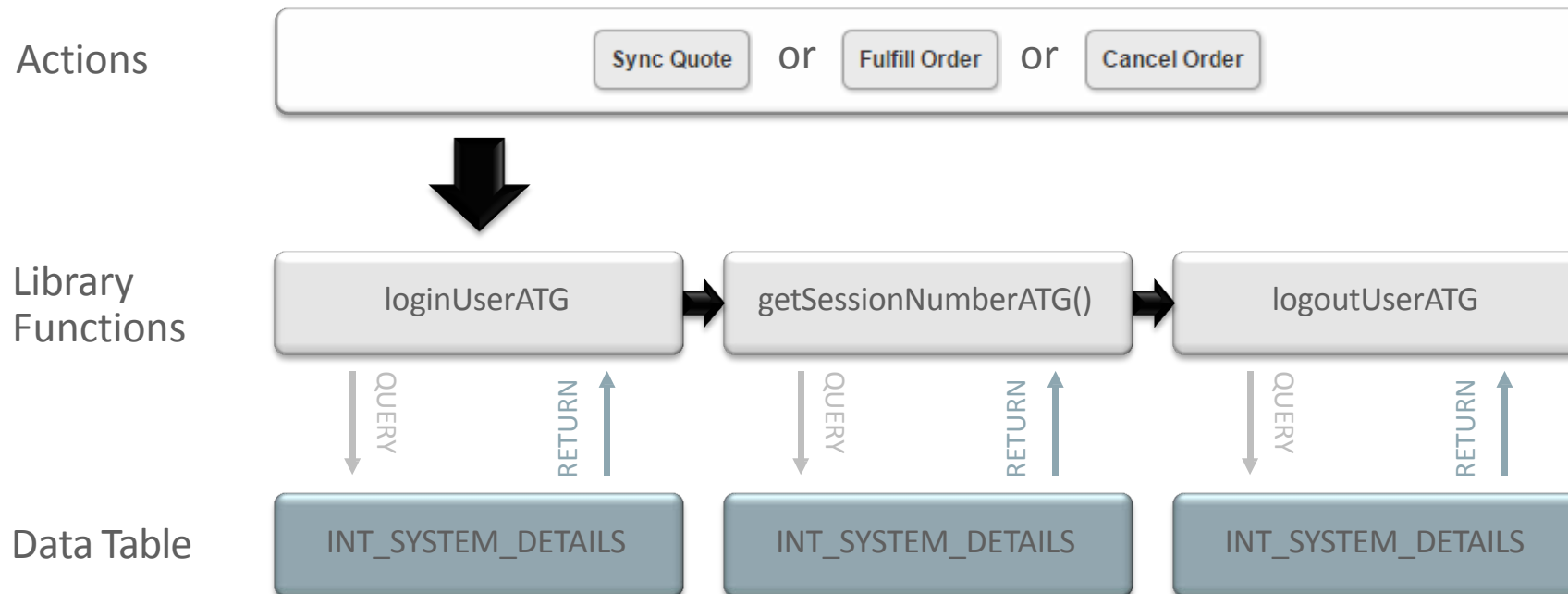
Add the 11 new Transition Rules to the "Sales Rep" or "Default" Participant Profile unless advised otherwise. These rules move the Transaction between steps when the new CPQ Cloud actions, or existing order-related actions, are fired.

Step	Transition RuleName	Action	Transition to Step	Description
Approved	Cancel Order	Cancel Order (order_cancel)	Canceled	Transaction moves from the "Approved" step to the "Canceled" step.
Approved	Cancel Quote	Cancel Quote (cancelQuote)	Canceled	Transaction moves from the "Approved" step to the "Canceled" step.
Approved	Reject Quote	Reject Quote (rejectQuote)	Rejected by Customer	Transaction moves from the "Approved" step to the "Rejected by Customer" step.
Approved	Requote Requested	Request for Requote (requestForRequote)	In Progress	Transaction moves from the "Approved" step to the "In Progress" step.
Approved	Accepted	Save (saveQuote)	Signed	Transaction moves from the "Approved" step to the "Signed" step.
Approved	Sync Quote to ATG	Sync Quote (syncQuoteATG)	Approved	Transaction is synced but stays in the "Approved" step.
Signed	Create Order	Create Order (order_start)	Ordered	Transaction moves from the "Signed" step to the "Ordered" step.
Signed	Reject Quote	Reject Quote (rejectQuote)	Rejected by Customer	Transaction moves from the "Signed" step to the "Rejected by Customer" step.
Ordered	Fulfill Order	Fulfill Order (order_fulfill)	Fulfilled	Transaction moves from the "Ordered" step to the "Fulfilled" step.
Ordered	Cancel Order	Cancel Order (order_cancel)	Canceled	Transaction moves from the "Ordered" step to the "Canceled" step.
Fulfilled	Reject Quote	Reject Quote (rejectQuote)	Rejected by Customer	Transaction moves from the "Ordered" step to the "Rejected by Customer" step.

Preparing CPQ Cloud for Integration

Data Tables (1 of 2)

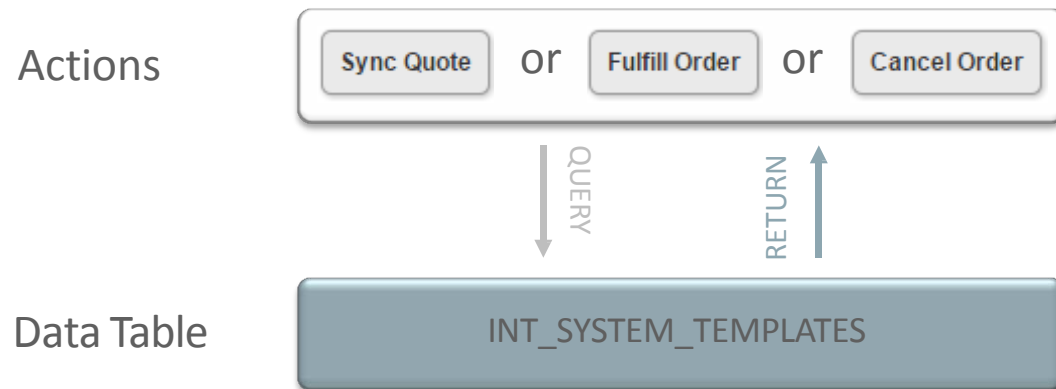
A new **INT_SYSTEM_DETAILS** data table must be created and will contain ATG site names, usernames, and end points. This data table will be queried by the new CPQ Cloud Library Functions to authenticate ATG session access.



Preparing CPQ Cloud for Integration

Data Tables (2 of 2)

A new **INT_SYSTEM_TEMPLATES** data table must be created will contain links to the Order Template (Transaction data) and Line Template (line-level data) files in the File Manager. This data table will be queried by three new CPQ Cloud actions to retrieve the template files so they can be populated with Transaction Data.



Next Steps

- White Paper on CPQ-ATG Integration
- For detailed instructions on creating the components in CPQ Cloud necessary to enable integration with ATG Commerce, as well as access to additional sample files and resources, see the White Paper on CPQ-ATG Integration.



ORACLE®