

# CPQ Cloud-Financial Order Management Integration

Implementation Overview

Oracle CPQ Cloud Product Management  
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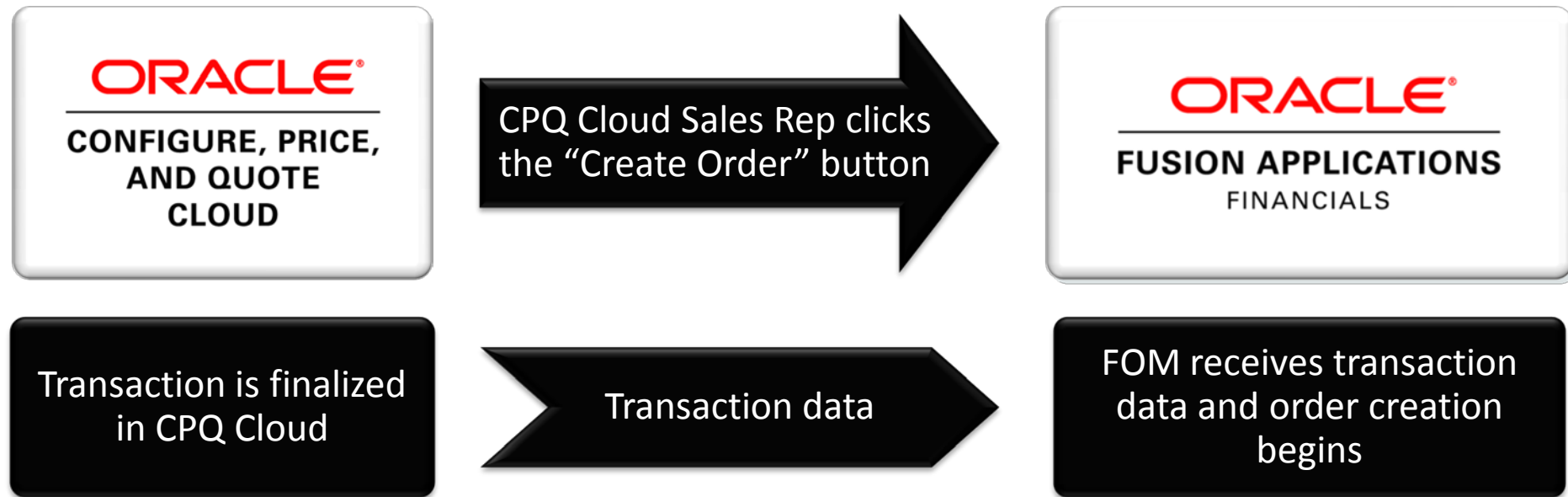
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# Disclaimer

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# CPQ Cloud-FOM Integration Overview

Integration between CPQ Cloud and Fusion Financial Order Management (FOM) enables CPQ Cloud to send FOM the details necessary for placing an order.



# Preparing FOM for Integration

## Prerequisites

- Updated to Fusion Release 9 or later
- Relevant Fusion Financial Order Management “ReceiveOrderRequestService” web service is up and running
  - “processOrderRequest” operation



# Preparing CPQ Cloud for Integration

## Prerequisites

- Updated to 2014 R2 or later
- Base Reference Application is deployed on the environment
- CPQ Cloud CDM is implemented on the environment
- CPQ Cloud Credit Check is implemented on the environment

## New CPQ Cloud Components Needed for FOM Integration

- 53 Attributes
- 4 Actions
- 10 Library Functions
- 3 Step Transitions (Document Views)
- 1 Validation Rule
- 2 Data Tables

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

Refer to the Implement CPQ-Financial Order Management Integration white paper for detailed administration instructions.

# Preparing CPQ Cloud for Integration

## Attributes

- 53 new attributes must be created in CPQ Cloud.
- Each new CPQ Cloud attribute has a corresponding attribute in FOM that will receive its value during the data transfer.
- New attributes relate to:
  - Shipping
  - Invoicing
  - Related data

# Preparing CPQ Cloud for Integration

## Actions

Four new actions are used to accomplish order-related tasks in FOM through CPQ Cloud:

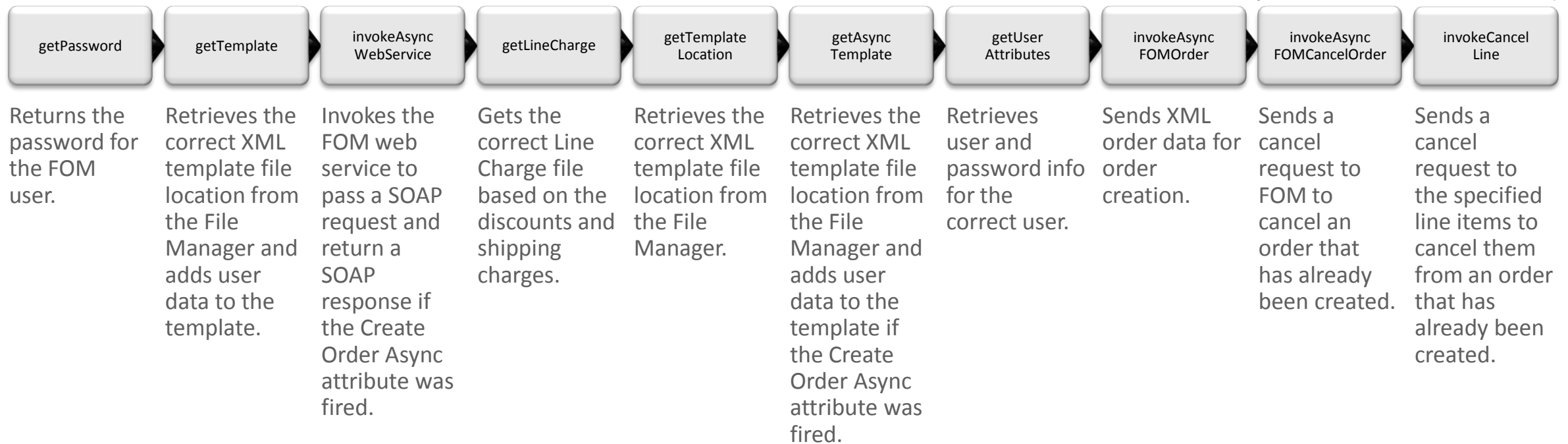
Action	Description	Present on the CPQ Cloud Layout
<b>Create Order</b>	Creates an order in FOM.	Yes
<b>Create Order Async</b>	Updates the Async Response attribute with the status of the order creation.	No
<b>Cancel Order</b>	Cancels an order after it has been created.	Yes
<b>Cancel Line Order</b>	Cancels the selected line item(s) from an order than has been created.	Yes (line-level)

# Preparing CPQ Cloud for Integration

## Library Functions

Ten new Library Functions will run when the **Create Order, Create Order Async, Cancel Order, and Cancel Line Order** actions are fired.

Only run when Cancel Order or Cancel Line Order actions are fired.





# Preparing CPQ Cloud for Integration

## Step Transitions (Document Views)

Each of the 3 new Document Views should be added for the "Sales Rep" or "Default" Participant Profile unless advised otherwise. The Document Views will hide the three new CPQ Cloud actions that appear on the layout depending on the current step.

Action	Step(s) Action is Shown	Description
<b>Create Order</b>	Approved	The Create Order action will be available for the CPQ Cloud sales users to invoke when the Transaction has been approved.
<b>Cancel Order</b>	Ordered, Being Changed / Canceled, Alternate Version Ordered	The Cancel Order action will be available for the CPQ Cloud sales users to invoke when the order has been placed.
<b>Cancel Line Order</b>	Ordered, Being Changed / Canceled, Fulfilled, Canceled, Rejected By Customer, Alternate Version Ordered	The Cancel Line Order action will be available for the CPQ Cloud sales users to invoke when the order has been placed and approved.

# Preparing CPQ Cloud for Integration

## Validation Rule

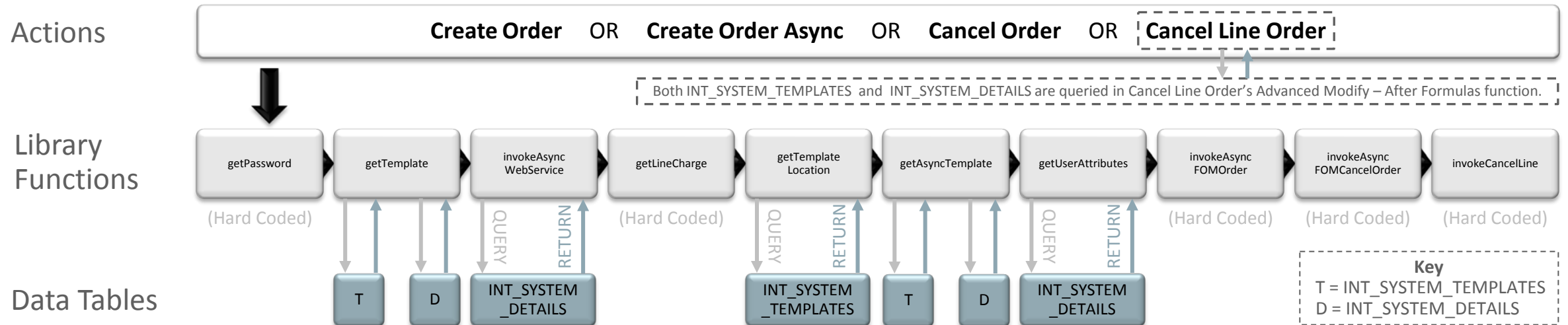
- One Validation rule, **Validation for Order**, must be created.
- This rule will prevent a CPQ Cloud sales user from proceeding further until the order is fulfilled.

# Preparing CPQ Cloud for Integration

## Data Tables

A new **INT\_SYSTEM\_TEMPLATES** data table will contain links to the LineCharge, Discount, shipping, CreateLine, CreateAsyncOrder, CancelOrderReq, CancelAsyncOrder, RecurringLineCharge, and CancelLineAsync XML template files in the File Manager. This data table will be queried by the new getTemplate, getTemplateLocation, and getAsyncTemplate Library Functions retrieve the template files so they can be populated with FOM order data.

A new **INT\_SYSTEM\_DETAILS** data table will contain FOM web service usernames and end points. This data table will be queried by the new CPQ Cloud Library Functions getTemplate, invokeAsyncWebService, getAsyncTemplate, and getUserAttributes to populate the XML template files using table data and EBS web services.



# Next Steps

## Implement CPQ-Financial Order Management Integration

For detailed instructions on creating the components in CPQ Cloud necessary to enable integration with Fusion Financial Order Management, as well as access to additional sample files and resources, see the Implement CPQ-Financial Order Management Integration white paper.



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