# Oracle Fusion Cloud Sales Automation

## How do I get started with the Oracle Revenue Transformation Solution?

Oracle Fusion Cloud Sales Automation
How do I get started with the Oracle Revenue Transformation Solution?

F88846-12



Author: Carmen Myrick, Sri Muliya, Brian Casey

# Contents

# Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

## Get Help in the Applications

Some application pages have help icons to give you access to contextual help. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons. If the page has contextual help, help icons will appear.

## Get Support

You can get support at *My Oracle Support*. For accessible support, visit *Oracle Accessibility Learning and Support*.

## Get Training

Increase your knowledge of Oracle Cloud by taking courses at *Oracle University*.

## Join Our Community

Use *Cloud Customer Connect* to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest *ideas* for product enhancements, and watch events.

## Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the *Oracle Accessibility Program*. Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

## Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to *oracle_fusion_applications_help_ww_grp@oracle.com*.

Thanks for helping us improve our user assistance!

# 1 Introduction

## Audience and Scope of This Playbook

Welcome to the Oracle Revenue Transformation Solution playbook! This guide provides you with the concepts and procedures you need to implement a revenue transformation solution using an integrated feature-set from Oracle Sales, Oracle CPQ, Oracle Order Management, Oracle Subscription Management, Oracle Pricing, and Oracle Revenue Management.

The name "Oracle's application suite for Revenue Transformation" in this guide refers to the integration of the products listed above that's now being redesigned to support a launch-to-cash model of sales flows in a subscription economy. The integrated design of the Oracle's application suite enables businesses to implement holistic solutions and reduce total cost of ownership by eliminating deployment complexities and management overhead. Because the Revenue Transformation Solution for growth is still being rolled out, for a complete solution that supports your business requirements, you may need to implement some features of other applications like Oracle CPQ and Oracle Subscription Management.

Oracle is focusing on a complete out-of-the-box solution to support you in your revenue transformation journey. However, the majority of the initial implementation steps are completed in the same Oracle Sales and Oracle CPQ integration setup and administration pages as previous releases.

## The Revenue Transformation Solution

As revenue leaders look to modernize and compete, that often means pivoting to new business models or expanding to hybrid models that incorporate subscriptions, products, and services. Oracle's Revenue Transformation Solution enables companies to go from launch to cash while they drive revenue in this new subscription-based economy.

Utilizing multi-channel, multi-business models, various types of products are being sold to the same buying groups within companies. Self-service continues to be the most preferred buying experience for buyers and buying groups in the B2B sphere.

### Modern Launch-to-Cash Solution

Oracle’s modern launch-to-cash solution is an end-to-end solution that supports enterprise-level complexity, from the front office building quotes to managing those contracts and billing through invoices. Payments integration eases revenue recognition through subscription renewal and renegotiation processes.

Oracle Sales is powering this transition with complete business flows that extend to the Oracle Fusion ERP suite for orders, invoicing, payments, and revenue recognition – enabling organizations to effectively and efficiently transition from one-time selling to anything-as-a-service (XaaS) models.

Oracle’s Revenue Transformation Solution combines Oracle Sales, Oracle CPQ, and Oracle Subscription Management – plus a host of Oracle's other revenue operations applications – to establish and accurately manage sales targets, sell any combination of products and services on a subscription basis, and provide global visibility into sales performance and revenue reporting. Integration with Oracle Commerce provides streamlined self-service buying experiences that leverage Oracle CPQ and back-office capabilities and drive revenue.

## Launch, Sell, and Manage Quotes

Use these modules or components of Oracle Sales and Oracle CPQ:

- Sales customer 360
- Product catalog and pricing
- Accounts and opportunities
- Subscriptions and quoting, plus deal management

## Manage Contracts and Billing

Use these modules or components of Oracle Subscription Management:

- Recurring and usage billing
- Modifications and adjustments
- Renewals management

## Invoice and Management Payments

Use these modules or components of Oracle Receivables:

- Automated billing and collections
- Multiple payment methods
- Reporting and error correction

## Recognize Revenue

Use these modules or components of Oracle Revenue:

- Automated revenue management
- ASC 606 and IFRS 15 compliance
- Reporting and forecasting
- Contract management

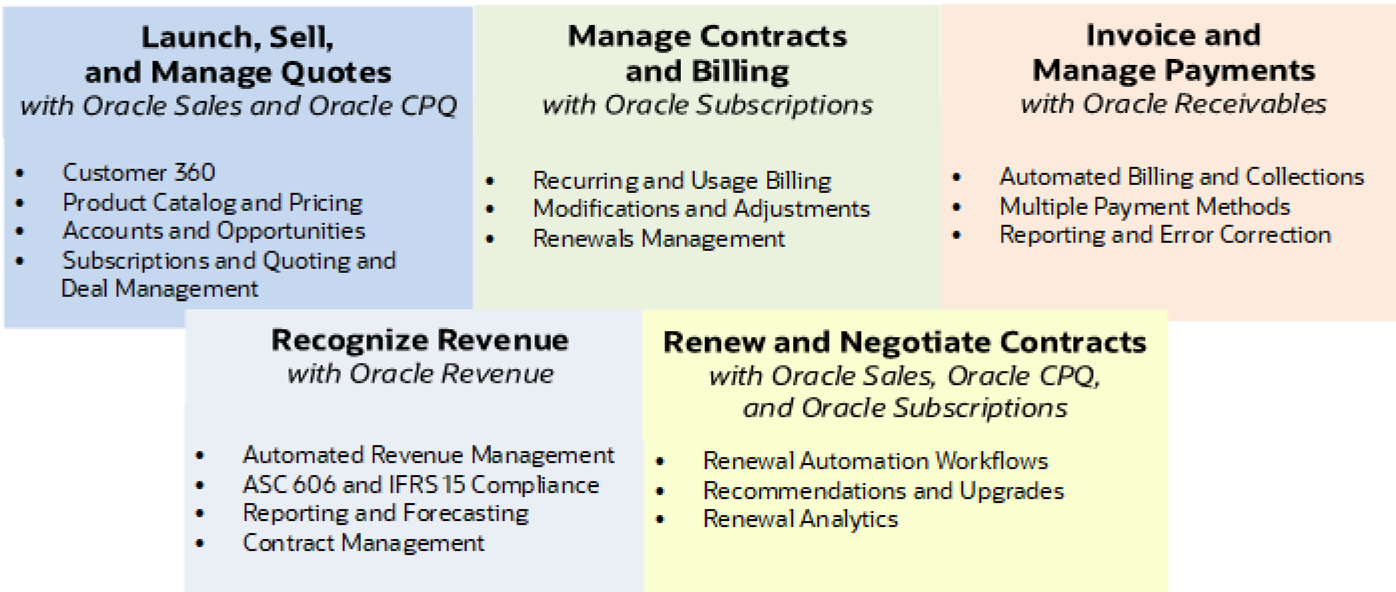
## Renew and Negotiate Contracts

Use these modules or components of Oracle Sales, Oracle CPQ, and Oracle Subscription Management:

- Renewal automation workflows
- Recommendations and upgrades
- Renewal analytics

## Overview of Modules and Components That Are Part of the Solution

This graphic gives you an overview of the modules and components that are part of the solution:




## Integration with Oracle CPQ Provides the Greatest Benefits

This solution is designed to work with Oracle Configure, Price, and Quote (Oracle CPQ). The feature can be used without the Oracle CPQ integration in a more limited manner; however, the use of the Oracle CPQ integration provides the greatest benefits.

- With Oracle CPQ integration on board, sales teams can create, price, launch, and manage products. Once launched, products are available for sales teams to use in deals.
- If Oracle CPQ isn't integrated, then products can't be priced or launched. However, they can be priced using Oracle Sales price books and made available in Oracle Sales by setting the Eligible to Sell attribute to Yes in the product setup. Oracle CPQ pricing information won't appear, however.

See *Supported Business Flows* for more information.

# Several Oracle Products Make the Complete Solution

The complete end-to-end Revenue Transformation solution brings together several Oracle products or modules.

## Product Workbench

Use Oracle Sales Product Information Management (SPIM) and Oracle CPQ to:

- Create and manage products
- Configure product structure and packages, offer pricing, and launch products through a guided Product Workbench
- Add products to the Sales Catalog

## Quoting, Guided Selling, and Subscription Ordering

Use Oracle CPQ to:

- Create accurate and functional configurations in seconds
- Offer complex pricing
- Create and manage quotes

> **Note:** This solution is designed to work with Oracle CPQ. The feature can be used without the Oracle CPQ integration in a more limited manner; however, the use of the Oracle CPQ integration provides the greatest benefits.

## Track Revenue, Manage Leads, Opportunities, Accounts, and More

Use these products:

- Oracle Sales
- Oracle Customer Data Management
- Oracle Opportunity Management
- Oracle Forecasting
- Oracle Partner Management

to:

- Manage accounts and contacts in a 360-degree view
- Forecast revenue and track quotas
- Create deals, leads, and opportunities
- Create quotes and send to Oracle CPQ for modification, then send back to Opportunity Management

## Capture and Fulfill Orders

Use Oracle Order Management to:

- Set up items (products) and sync with Oracle Sales products
- Capture sales orders using multiple channels
- Fulfill sales orders
- Track and revise sales orders

## Manage Subscription Contracts and Billing

Use Oracle Subscription Management to:

- Create and manage subscriptions
- Manage subscription modifications, adjustments, and renewals
- Manage recurring and usage charges and warranties

### Invoicing and Payments

Use Oracle Accounts Receivables and Oracle Revenue Management to:

- Automate invoicing and collections
- Offer different payment options
- Analyze and report on errors

## Case Study

This guide uses a case study to describe the capabilities of the Oracle Revenue Transformation Solution and to define the scope the tasks to implement and use the Oracle Revenue Transformation Solution.

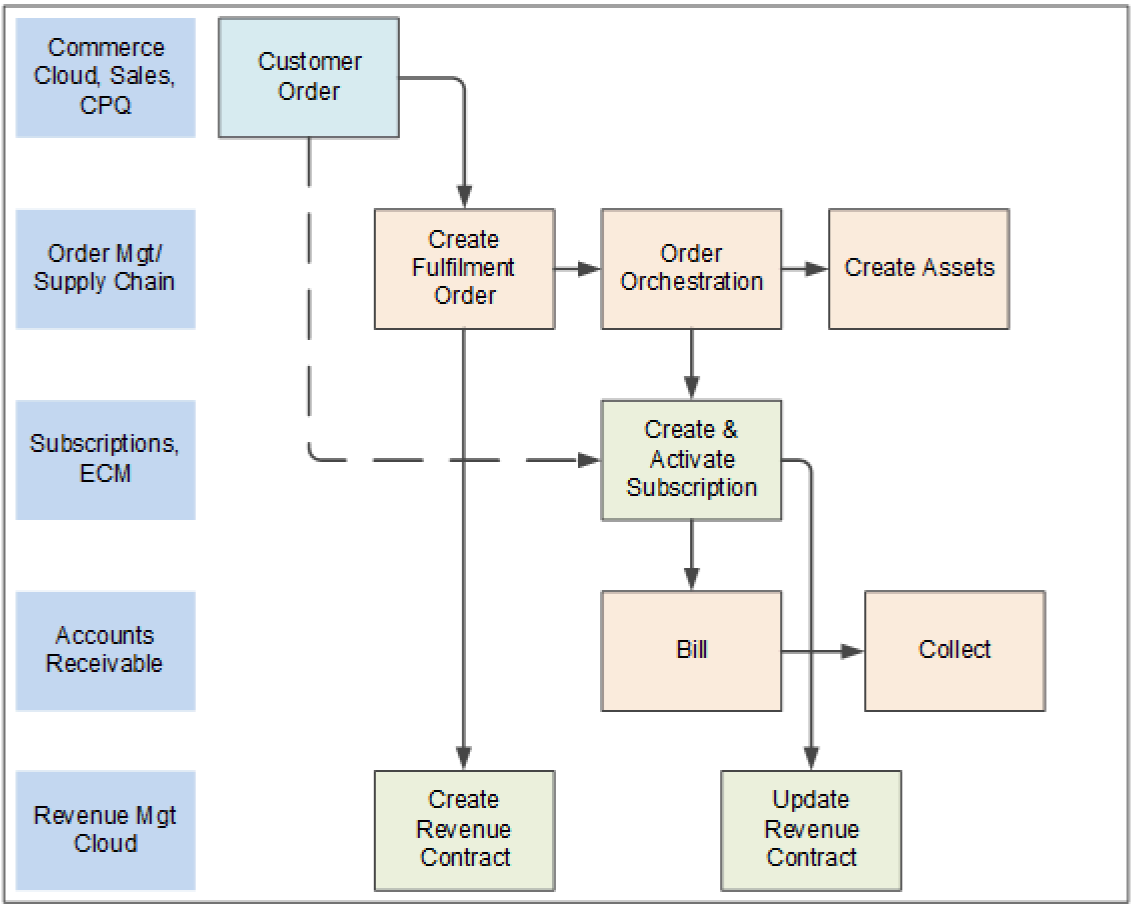
The case study is based on a fictitious product, the Supremo branded Power Generation Package subscription offering.

## Supported Business Flows

The Oracle Revenue Transformation Solution supports several business process flows, such as the ones described in this topic.

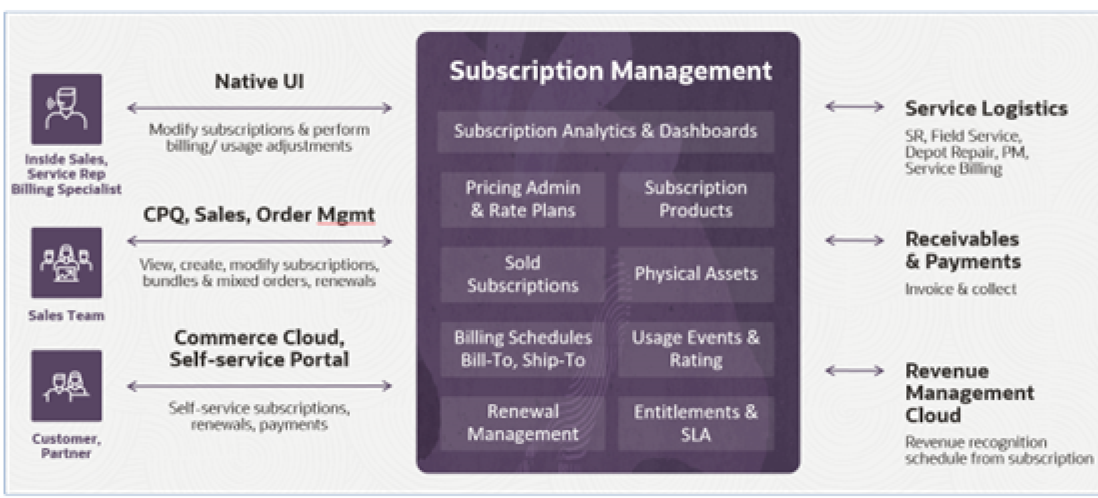
### Goods and Subscriptions Sale and Fulfillment Flow

This diagram shows the Goods and Subscriptions Sale and Fulfillment business process flow:




## Quote to Cash in the Subscription Economy Flow

This diagram shows the Quote to Cash in Subscription Economy business process flow:



# 2 Prepare

## Setup Checklist

Follow the setup checklist steps as you implement and configure the Revenue Transformation Solution.

### Setup Checklist for the Revenue Transformation Solution

Here are the high-level steps to set up the Revenue Transformation Solution:

***Setup Checklist for the Revenue Transformation Solution***

| Step | Where to Find More Information |
|---|---|
| **Step 1: Prerequisites**<br>• Ensure that a user with the Sales Administrator job role and any Sales Product Managers have the required permissions in Oracle Product Information Management (PIM).<br>• Configure the Sales Product Manager preferences for saved search in the Sales Products list page.<br>• Configure Adaptive Search for the Product object to make a few fields available in Adaptive Search (Workspace). | *Set Up Users for Templates and Workbench* |
| **Step 2: Set up Oracle CPQ**<br>Set up Oracle CPQ, including configuring the integration URLs and the integration user. | *Set Up Oracle CPQ Integration* |
| **Step 3: Set up Product Workbench**<br>Set up the product workbench consisting of templates and a product support framework in the Oracle Sales Products UI. | *Set Up Product Templates* |
| **Step 4: Set Up Data Integration and Data Sync**<br>Set up the data integration with Oracle CPQ. And set up the framework to sync Sales products and Oracle CPQ Parts. | *Configure Product Data Sync* and *Configure Data Sync for the Product Workbench* |
| **Step 5: Launch Products**<br>Launch products, including configuring product structures, adding products to the catalog, pricing products, and making them available to sell. | *Steps to Launch Products* |

| Step | Where to Find More Information |
| --- | --- |
| **Step 6: Enable Pricing Support**<br>Set up pricing functions, including pricing support for rate plans and multiple pricing. And, set up your implementation to use price lists through Oracle Fusion Pricing. | *Base Pricing* |
| **Step 7: Enable Oracle Commerce Integration**<br>Set up Oracle Commerce to have an integrated e-commerce solution. | *Overview of Oracle Commerce* |
| **Step 8: Enable Oracle Subscription Management Integration** | *Overview of Oracle Subscription Management* |
| **Step 9: Integrate with Oracle ERP Products**<br>Integrate with Oracle ERP Products for a complete solution, such as the orders and receivables flows. | *Integrate with Oracle ERP Applications* |

# Set Up Users for Templates and Workbench

A user with the Sales Administrator job role sets up the product templates in Application Composer. Template setup is a one-time step that lets the Sales Product Manager use the Products Workbench.

As supplied, both the Sales Product Manager and Sales Administrator roles have the required permissions to use the Product Workbench.

The specific permissions for the Product Workbench are:

- View Products
- Launch Products
- Retire Products

## User Setups in Oracle Product Information Management

You must ensure that the Sales Administrator user and any sales product managers can do these actions in Oracle Product Information Management (PIM):

- Create predefined templates
- Copy predefined templates
- Add predefined templates

To manage item templates in Setup and Maintenance, go to: **Manage Item Classes** > **Root Item Class** > **Templates and Formats** > **Item Templates**.

Further, the Sales Administrator or the Sales Product Manager must have privileges to do these actions in PIM:

- View Item Structure
- Manage Item Structure

To manage Sales Administrator security in PIM, go to Setup and Maintenance: **Manage Item Classes** > **Root Item Class** > **Security** > **Principal (Group)** > **Sales Administrator Actions**.

## Set Up Product Manager Preferences for Search

In the Sales Products list page, use the Manage Columns action to configure the Sales Product Manager's saved search.

## Set Up Product Attributes and Adaptive Search

Configure Adaptive Search for the Product object to make these fields available in Adaptive Search (Workspace).

- Name
- Product Number
- Sales Product Type Code
- Structure Item Type
- Launch Status

Use the Configure Adaptive Search task in Setup and Maintenance to enable search on additional product attributes and to configure the following "group by" views for Sales Product Manager's product list.

- Sales Product Type Code
- Structure Item Type
- Launch Status

# 3 Set Up Oracle CPQ

## Understand How Sales and Oracle CPQ Integrate Parts and Products

The Revenue Transformation Solution supports comprehensive product administration and product pricing capabilities. You get the ability to create, price, manage, and launch standard products and product bundles with a unified user experience that leverages both Oracle Sales and Oracle CPQ capabilities.

You can create:

- Hierarchical bundle structures with components, such as one-time product purchases
- Related services, such as training or installation
- Related subscriptions, such as service-level agreements or maintenance
- Extended warranties

Pricing for each bundle component is supported using Oracle CPQ's advanced pricing capabilities -- supporting the most competitive overall product bundle price.

The unified sales catalog lets you offer both standard products and sophisticated product bundles that are easy to create, administer, and launch with the advanced user experience.

In addition, you can easily bundle hierarchically-related product components together into competitively priced solution bundles, empowering sales users to sell product packages as turnkey solutions aligned with the complete solutions customers want to buy.

> **Note:** The unified Sales catalog is designed to be used with the Oracle CPQ integration. The feature can be used without the Oracle CPQ integration in a more limited manner; however, the use of the Oracle CPQ integration provides the greatest benefits.

## Set Up Oracle CPQ Integration

You need to do a few things to set up the Oracle CPQ integration:

1. *Configure the Integration URLs*
2. *Configure the Integration User*
3. *Understand Sales SPIM Integration*

### Configure the Integration URLs

Use the Manage Oracle CX Sales to Oracle CPQ Cloud Integration task in Setup and Maintenance to configure the integration URLs for Oracle CPQ. See the topic, *Create the Integration URLs*, in the *Integrating Oracle Sales with Oracle CPQ* guide.

> **Note:** To enable pricing in products, you must also enter the pricing integration URL.

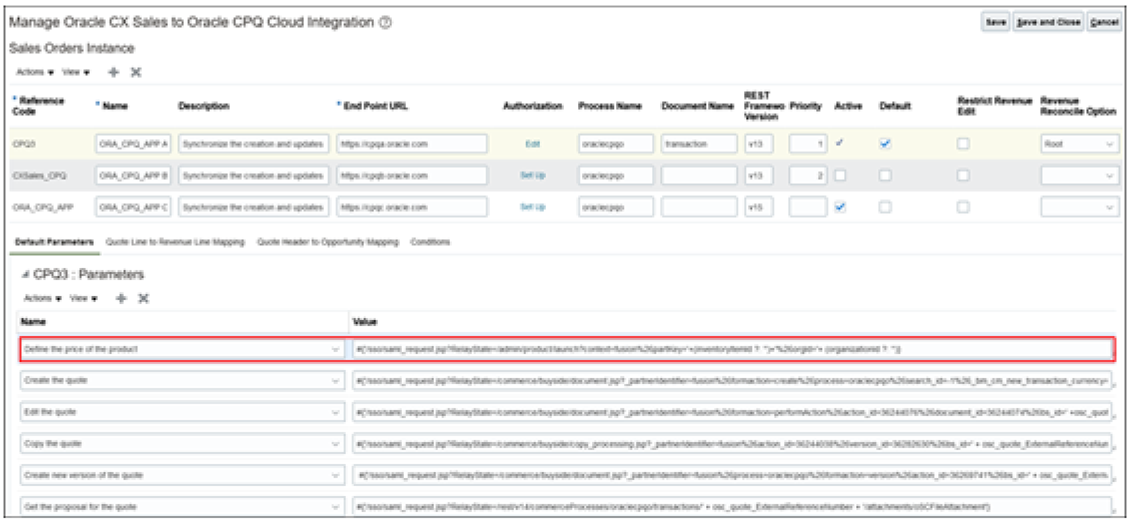
### Integration URL for Pricing

You must add a Pricing integration URL, as follows, using the Manage Oracle CX Sales to Oracle CPQ Cloud Integration task in Setup and Maintenance.

Add the Pricing integration URL after you've added the other integration URLs, as described in *Create the Integration URLs* in the *Integrating Oracle Sales with Oracle CPQ* guide. Here are the values:

- **Parameter name:** `Define the price of the product`
- **Value:** `#{'/sso/saml_request.jsp?RelayState=/admin/product/launch?context=fusion%26partKey='+(inventoryItemId ?: '')+'%26orgId='+ (organizationId ?: '')}`

This screenshot shows an example of the Pricing integration URL in the Manage Oracle CX Sales to Oracle CPQ Cloud Integration page:




## Configure the Integration User

An integration user performs some of the integrations between Sales and Oracle CPQ, since that user can authenticate with Sales and has access to the Sales data. See the topic, *Configure the Integration User*, in the Integrating Oracle Sales with Oracle CPQ guide.

## Understand Sales SPIM Integration

You should understand how Sales and Oracle CPQ integrate in terms of products and parts. At this point you should also read the *Oracle CX Sales SPIM Integration* Oracle CPQ online help article to gain a greater understanding of the integration.

# 4 Set Up Your Product Workbench

## Product Workbench Overview

The Product Workbench lets Sales Product Managers define products and product bundles, add products to the Sales Catalog, price products leveraging Oracle CPQ pricing capabilities, and launch products from a single place using a guided process flow.

> **Note:** The Product Workbench uses the underlying technology of the Sales product model, called the Sales Product Information Master, or SPIM.

Product launch capabilities enable your organization to bundle hybrid items into turnkey product solutions, organize them in the Sales Catalog, and offer competitive pricing to fit the buyer's precise needs.

## Set Up Product Templates

As a one-time task to set up the Oracle Revenue Transformation Solution, you need to set a profile option and map product templates to Oracle Product Information Management (PIM) item templates.

### Set the Profile Option

Set the profile option, ORA_QSC_SELECT_PIM_TEMPLATES, at the Site level to No. In Setup and Maintenance, you use the Manage Administrator Profile Values task. Setting this profile option makes the product template mapping UI available in Application Composer.

### Overview of Mapping Product Templates

To make the product templates available to the user you've set up as your product manager, you map product templates in Application Composer. This setup involves mapping item templates from PIM names to user-friendly names. For example:

- Finished Goods > Standard Product
- PTO > Bundle
- PTO Options > Bundle Options

The supplied PIM item templates that are accessible to the Sales Administrator have these attributes:

- **Item Class:** Root Item Class
- **Organization:** QSC_SALES_PRODUCTS_INVENTORY_ORG_ID

# Steps to Map Product Templates to PIM Templates

Here are the steps to map product templates to PIM templates

1. Navigate to **Configuration** > **Application Composer** > **Product Templates**.
2. In the Map Product Templates page, click the add icon.
3. In the Create Product Template Mapping window, select a PIM item template, for example, `PTO Model`.
4. Map a Sales product template to the PIM template by giving it a name that's meaningful to your implementation, for example, `Bundle`.
5. Click **Add**.
6. As needed, repeat these steps to expose more templates.

   **Note:** You can't map the same PIM template to the same name more than once.

   Here's an example of the Map Product Templates page:

# 5 Set Up Data Integration and Data Sync

## Configure Product Data Sync

Oracle's data integration framework for Sales and Oracle CPQ syncs data between Sales products and Oracle CPQ Parts. Any time a product is created or updated in Sales, the framework syncs the data to Oracle CPQ Parts.

> **Note:** The integration is one way – from Sales to Oracle CPQ.

### High-Level Setups for the Data Integration Mapping

Here are the high-level tasks involved with the data integration mapping:

1. Ensure that the user requirements are met. See: *Requirements for the Setup Users*
2. Ensure that the integration between Sales and Oracle CPQ is established. See: *Establish Sales-Oracle CPQ Integration*
3. To sync product structures in addition to individual products, create a specific data security policy for product groups. See: *Create a Data Security Policy for Product Structure*
4. Set the profile option, Enable Data Integration (ORA_ZCA_ENABLE_DATA_INTEGRATION). See: *Set the Enable Data Integration Profile Option*
5. Review the predefined data integration mappings to ensure that they meet your needs. See: *Review Predefined Integration Mappings*
6. Create and run Routines to start the integration process. See: *Create Routines to Start the Integration Process*
7. Test the integration. See: *Test the Integration*

To learn about your data sync options, see *Configure Data Sync for the Product Workbench*.

### Requirements for the Setup Users

Your setup users need this access:

- Setup and Maintenance task: Manage Item Class
- A user with access to manage Routines: Manage Routines (ZCA_MANAGE_ROUTINES_PRIV). This privilege is needed to set up the near real-time sync for products and structures).
- In addition, users need the following role: Data Integration Management (ORA_ZCA_DATA_INTEGRATION_MANAGEMENT_DUTY).

### Establish Sales-Oracle CPQ Integration

First, enable the integration:

1. Go to Setup and Maintenance.
2. Search for and select the task, Manage Data Integrations.
3. In the Data Integrations landing page, click **Manage Connections**.
4. Edit the record where the application name is `CPQ`.
5. Set up the record as follows:
    - Description: Enter any description that you want.

- Endpoint URL: Enter the CPQ Environment URL.
- URI Version: Use `v17`.
- Authentication Type: Use Basic Authentication,
- User name/Password: Use your CPQ Admin Credentials.

6. Save your changes.

See *Set Up Oracle CPQ Integration* earlier in this guide and *Integrating Oracle Sales with Oracle CPQ guide* for more details on required setups.

## Create a Data Security Policy for Product Structure

This step is only required to sync product structures in addition to individual products.

1. In Setup and Maintenance, navigate to **Manage Item Class** > **Root Item Class** > **Security**.
2. Create a new record with these values:
   - Principal: Group
   - Name: Sales System Integrator
   - Organization: The organization of your products and structure
3. Create records in the Actions table for these actions:
   - View Item Basic
   - View Item Structure
   - Maintain Item Structure

## Set the Enable Data Integration Profile Option

1. Navigate to Setup and Maintenance.
2. Search for and select the Manage Administrator Profile Values task.
3. Set the profile option, Enable Data Integration (ORA_ZCA_ENABLE_DATA_INTEGRATION) to Yes at Site level.

## Review Predefined Integration Mappings

Review the predefined data integration mappings to ensure that they meet your needs.

1. Outside of a sandbox, navigate to **Configuration** > **Application Composer** > **Data Integration Management**.
2. Click **Integration Maps** and review the supplied mappings.
3. Drill down into an integration map record to see all the attributes mapped between the source and target applications.

## Create Routines to Start the Integration Process

Use Routines to call the integration process. See *How do I access the Routines dashboard?* for steps about how to navigate to the Routines dashboard.

**Routine for Product Integration**

Create and submit a routine with these values:

- **Basic Details**
   - **Name:** Enter a name

- **Object:** Product

- **Trigger**
  - **Run this routine:** Attribute Changed
  - **Attributes:** Select all the product attributes that your users are allowed to update in Sales (maximum of 30). You must select **Launch Status** for this integration to work
- **Actions**
  - Add a new action with the Action Type of `Synchronize Products with CPQ`. This is the predefined integration map.
  - **Note:** You can also select any other integration map.
- **Rules**
  - **Create the following rule:** Launch Status (Attribute) Not Equals (Operator) Draft (Value)

**Routine for Product Structure Integration**

Create and submit a routine with these values:

- **Basic Details**
  - **Name:** Enter a name
  - **Object:** Product Structure
- **Trigger**
  - **Run this routine:** Record Updated
- **Actions**
  - Add a new action with the Action Type of `Structure and Components with CPQ`. This is the predefined integration map.
  - **Note:** You can also select any other integration map.
- **Rules**
  - Leave blank

Create another routine with all values similar to the previous one -- except, in the Trigger section, use: **Run this routine:** Record created.

## Test the Integration

Finally, test the integration:

1. Create or update a product in Sales.
2. Confirm that the product gets synced with Oracle CPQ.
3. Similarly, create a new product structure and confirm that the structure gets synced with Oracle CPQ.

# Best Practices for Product Data Sync

The supplied framework syncs product data between PIM, the Product Workbench (Sales Product Information Management, or SPIM), and the Oracle CPQ product store (parts and BOMs) to ensure that product designs can be extended for appropriate sales automation, while keeping the foundational definition of PIM for back-office functions.

When you manage products in SPIM, SPIM updates the product items in PIM instantly and syncs the parts and BOM data in Oracle CPQ Products, using an Oracle CPQ batch sync job or using Oracle Integration Cloud (OIC) near real-time sync.

## Points to Keep in Mind About Product Data Sync

Keep these points in mind:

- If you're managing and updating products in PIM directly, then you must run or schedule the Import Sales Products from PIM Data Hub scheduled process before the Oracle CPQ Batch Sync runs. See: *How are products synced between the inventory product master and sales?*
- Product detail pages are extensible. If you need to bring certain PIM functional attributes into the Product Workbench, you can expose as many additional fields in these pages as you want using Oracle Visual Builder Studio. About 40 fields are supplied to support your product management use cases. See: *How can I modify standard Sales pages?*
- For the opportunity-to-quote sales flow to work, you need to add the products to a product group in the Sales Catalog. If the products aren't in a product group in the Sales Catalog, then the sales application can't use them. Make sure products are synced with Oracle CPQ and configured and priced before you create a quote from an opportunity with those products. See: *Get Started with Quotes and Orders*
- Use the Product Workbench (SPIM) guided process to manage your Sales products. The streamlined process eliminates the need for multiple tool sign-ins and complex administrative setups (for example, in PIM, the Sales Catalog, and Oracle CPQ configuration and pricing), thus saving you time and resources. See: *Common Product Administration, Product Bundling and Product Launch*

# Configure Data Sync for the Product Workbench

The Product Workbench requires that product details be synced to enable pricing in Oracle CPQ. The product data sync across the Sales Product Information Master (SPIM) and Oracle CPQ applications is a near real-time sync.

Near real-time sync means you don't have to wait for a scheduled process to run for products to sync.

- See *Oracle CX Sales SPIM Integration* for information about synchronization status details.
- See *Establish Oracle CX Sales SPIM as the Products Source for an Oracle CX Sales – Oracle CPQ Products Integration* for Oracle CPQ Parts integration procedures.
- Oracle CPQ BOM tables and mapping are required to enable sync of Oracle Sales product structures and components to Oracle CPQ. See *Create and Map CPQ BOM Tables* to create and map Oracle CPQ BOM tables for more information.

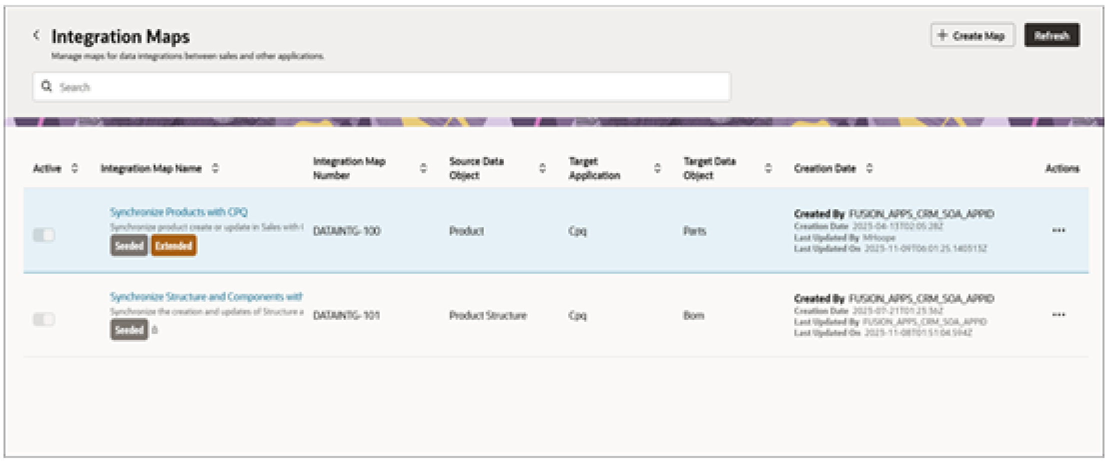
# Use Routines to Enable Near Real-Time Sync

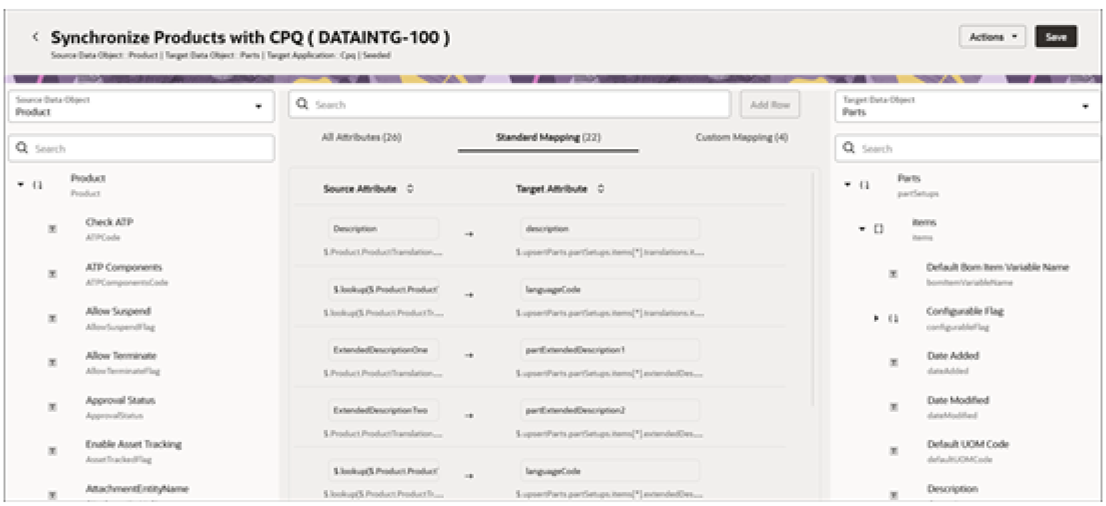
You use Routines to enable near real-time sync.

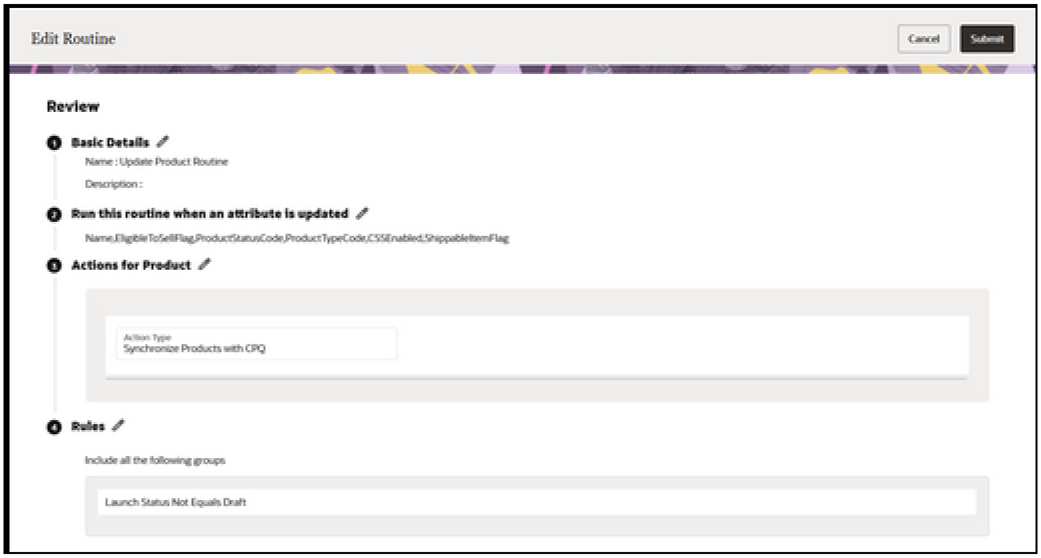
In this setup, you'll use the Product and Product Structure objects. Using Routines with these objects lets you price products immediately after you've defined your product in the Product Workbench.

Configure both Create and Updated triggered routines for Product and Product Structure objects.

Follow the actions and rules in the example screenshots that follow. Configure both "Create" and "Updated" triggered routines for "Product" and "Product Structure" objects.







*Related Topics*

- Overview of Routines
- How do I access the Routines dashboard?

# 6 Launch Products

## Product Use Case

Keep in mind the product use case described here as you go through the procedures to launch products using the Product Workbench.

See the topic, *Steps to Launch Products*, for the procedures based on this use case.

### Use Case: Supremo Power Generation Package

A new Supremo Power Generation Package subscription offering needs to be launched quickly by the product manager to enable salespeople to start selling the competitively priced, packaged items as a turnkey solution to target what the customer wants to buy.

Here's the breakdown of the Supremo Power Generation package:

- Supremo Power Hybrid Generator (Standard Product - Goods)
- Supremo Power Care Commercial Power Monitoring Service (Standard Product - Subscription)
- Supremo Power Extended Warranty Generator Warranty (Standard Product - Extended Warranty)
- Supremo Control Panel (Package option):
  - Supremo Controller Panel – Basic (Standard Product- Goods)
  - Supremo Controller Panel – Advanced (Standard Product- Goods)

## Quote-to-Cash Model in Sales and Subscription Economy

Product launch empowers businesses to bring products to market quickly and effectively to fit the buyer’s precise needs.

Once launched, the competitively priced products are readily available to participate in the sales process, enabling salespeople to manage opportunities, create quotes, orders, subscriptions, bill and manage revenue -- driving a modern launch-to-cash sales flow to accelerate your revenue transformation journey.

> **Note:** With Customer 360 salespeople have a consolidated view of customer products (Assets and Subscription coverages). This consolidated view lets them identify upsell and renewal opportunities. And, it supports opportunity and quote creation with KIT or PTO configured products.

# Steps to Launch Products

After you set up the framework for your products and product bundles, you launch the products using the Product Workbench.

A streamlined product launch workflow ensures that products are configured, priced, and ready for sales in a single process. It empowers businesses to bring products to market quickly and effectively. The step-by-step process leverages modern functions of Oracle CPQ's Configuration and Pricing capabilities.

Here are the high-level steps:

1. *Create a product*.
2. *Specify additional product details*.
3. *Add the product to the Sales Catalog*.
4. *Define the product structure*.
5. *Configure the product in Oracle CPQ*.
6. *Specify the product price*.
7. *Launch the product*.

## Step 1: Create a Product

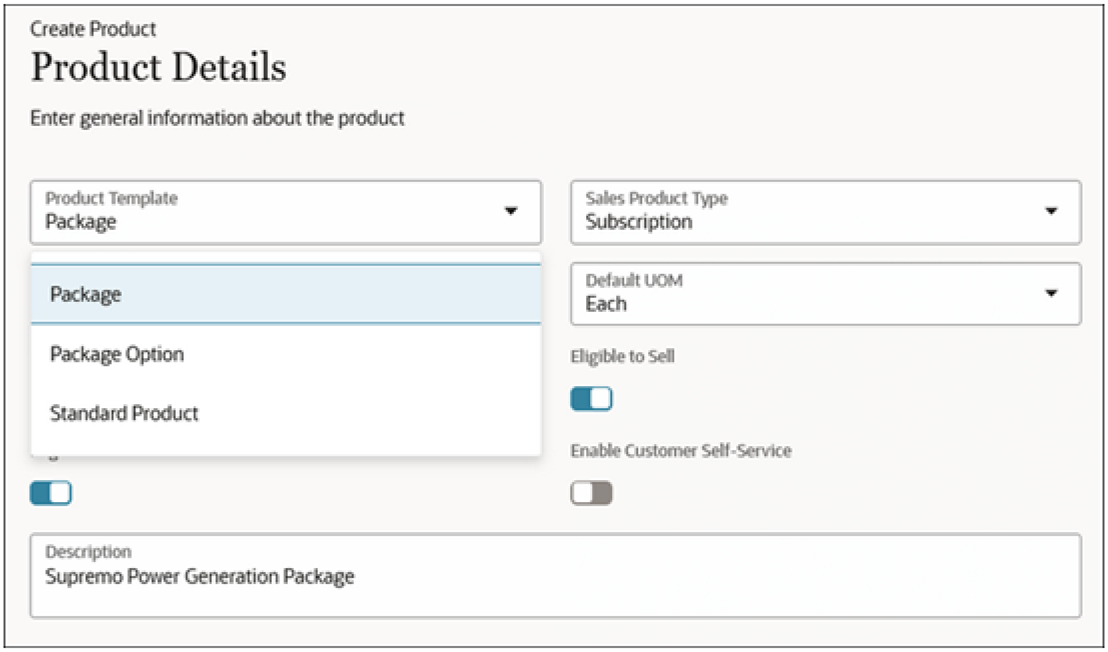
You can use the predefined templates (for example, Finished Goods: Standard Product, PTO Model: Package, PTO Option: Package Option Class) to define popular sales product offering structures like KIT or Configured product as per your business need.

1. Navigate to the Products list page.
2. Create a product.
3. Select the product template and sales product type, according to your business requirements.

Note these important product attributes:

- **Product Template**: Indicates the configured item templates in Product Hub/PIM (Product Information Management) that can be selected to define various Sales product structures with defaulted attributes.
- **Sales Product Type**: Indicates whether this product can participate in specific Sales management processes by default, without additional configurations. For example, if the value is Subscription, the products will follow Subscription Management (that is, the Subscription Sales Management process).
- **Product Number**: Refers to alphanumeric Public Unique Identifier (PUID) of the product. If you leave this field blank, the application auto-generates the product number as configured in Public Unique Identifier Sequence Generation setup.
- **Eligible to Sell**: Indicate whether to allow a product to be sold to external customers.

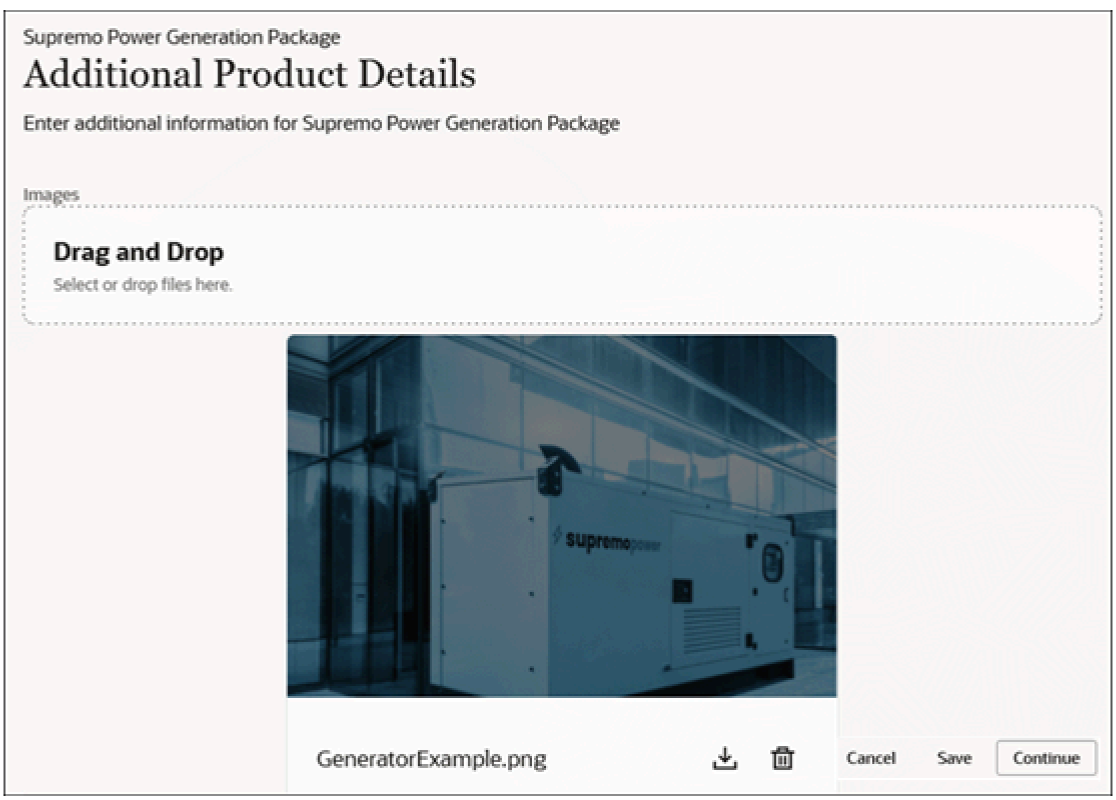
This image shows an example of the Product Details page in the Create Product flow:




## Step 2: Specify Additional Product Details

Specify additional product details. You can add product images and you can customize this step to include more product attributes using Oracle Visual Builder Studio.

This image shows an example of the Additional Product Details page:



## Step 3: Add the Product to the Sales Catalog

Add the product to the Sales Catalog. In this step, you associate the product with a specific product group in the Sales Catalog. After you add the product to the catalog, you make the product discoverable in the Sales Catalog, but only after it's launched.

This image shows an example of the Sales Catalog page where you associate the product with a product group:


## Step 4: Define the Product Structure

Define the product structure. You can define a multilevel, hierarchical product structure that meets your business requirements.

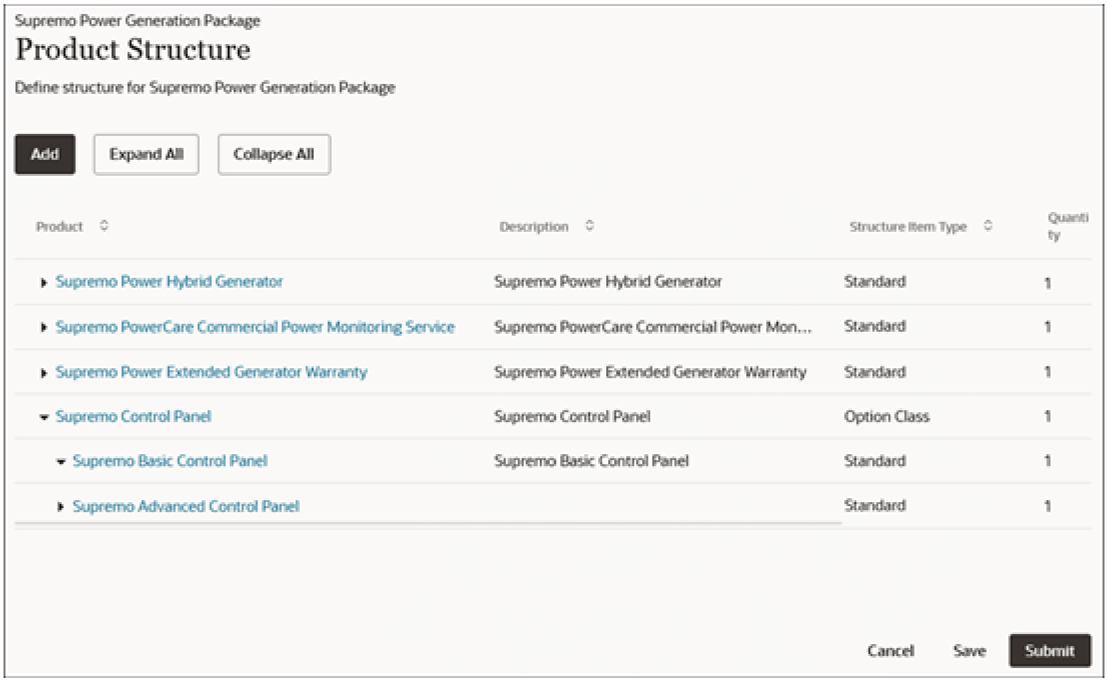
**Note:** Skip this step if you're defining a standard product.

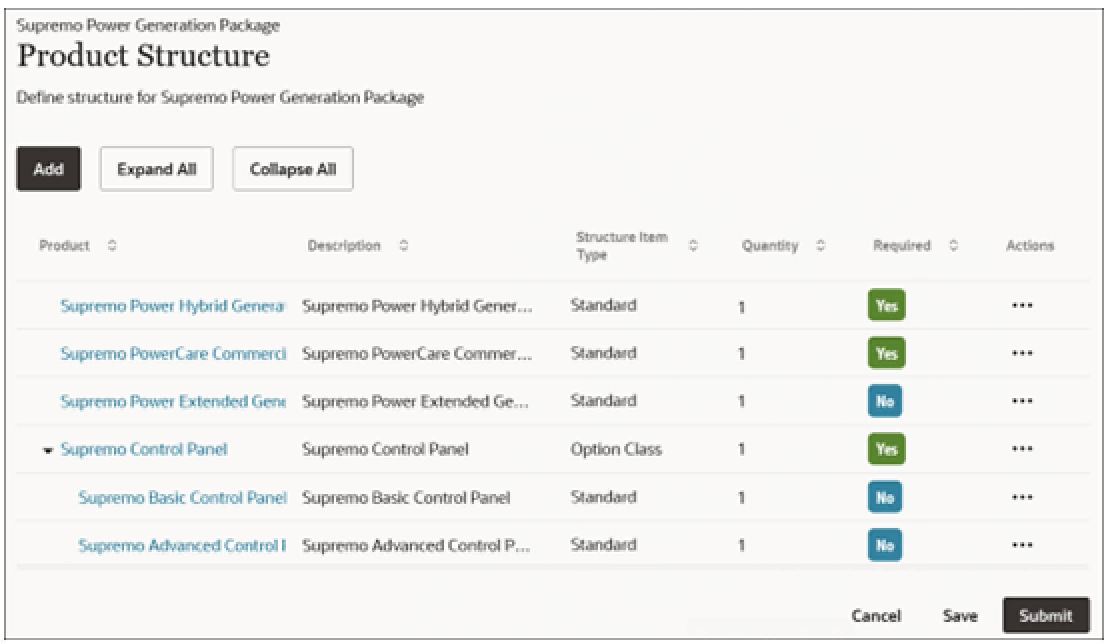
Make sure you have the individual product components (of structure item type Standard/Option Class/Model) available to "Add" to the product structure. This step enables you to package hybrid products into a bundle and lets you price and sell competitively.

Saving at any step saves your product definition in Draft status and lets you continue editing the product definition from the list page. When you submit, this:

- Finishes your product design
- Updates the product definition to Created status
- Syncs the product data to the Oracle CPQ product definition
- Makes the product available for you to continue with pricing

The following two images show examples of the Product Structure page where you define the structure of a product:



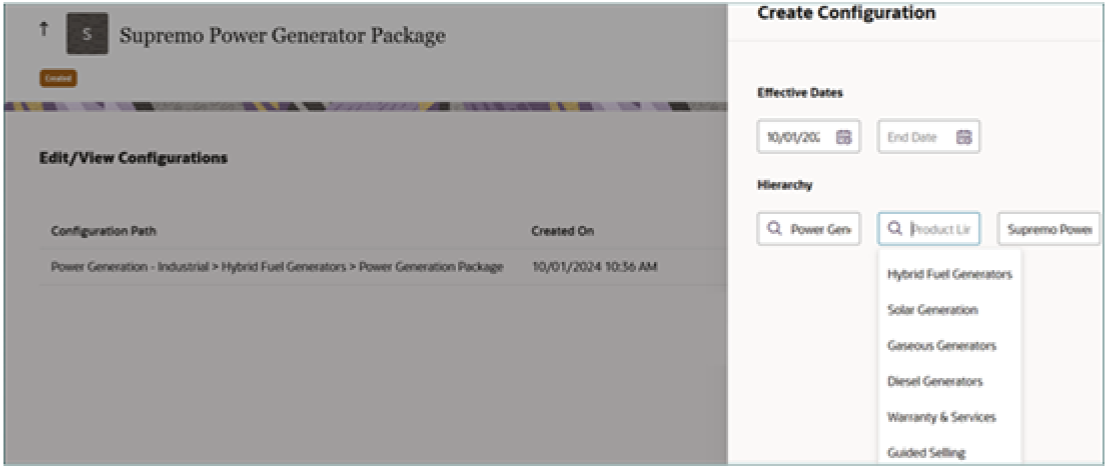




## Step 5: Configure the Product

Configure the product. Once the product is created, the Configure action gets enabled only for those products that have the Model type of structure. The Configure action:

- Connects to Oracle CPQ's Model Configuration
- Maps products to the product model catalog
- Deploys the configuration for runtime quoting

This image shows an example of a product configuration in progress:

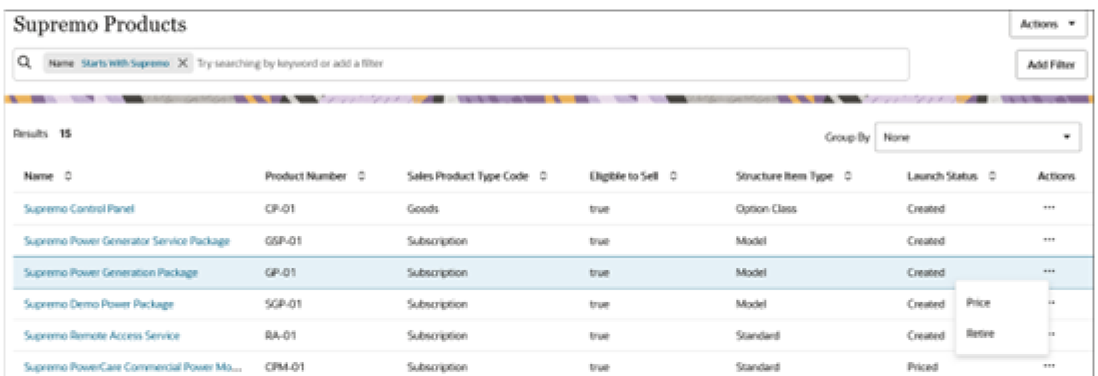



## Step 6: Specify the Product Price

Specify the product price. Once the product is created, the Price action is enabled that lets you define the product price.

Make sure you set up your price definition and business functions in the *Oracle CPQ Pricing Portal* to enable competitive product pricing in the Product Workbench. Also see: *Overview of Pricing Integration* in this guide.

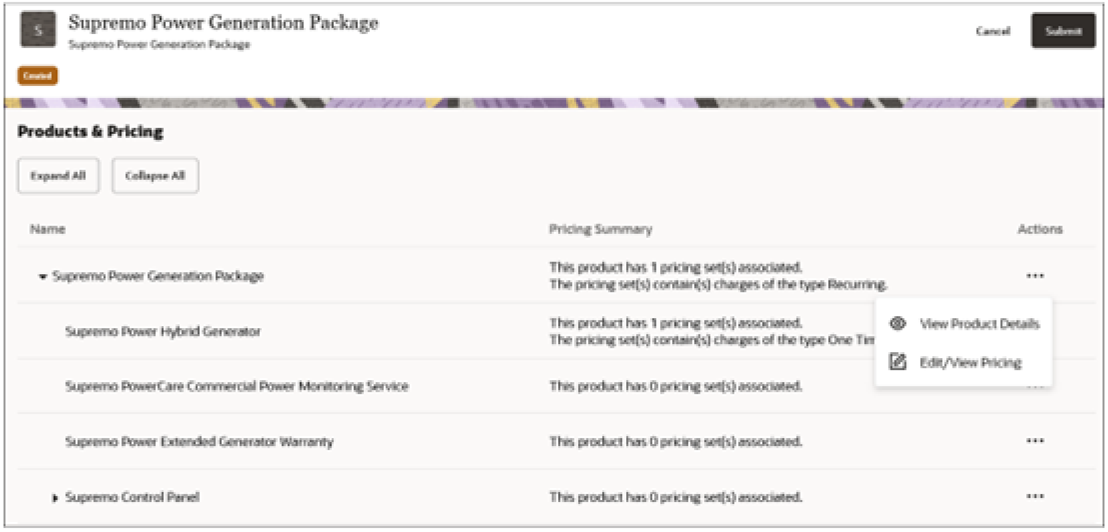
This image shows an example of the Products and Pricing page where you set the product price (or you can retire the product):



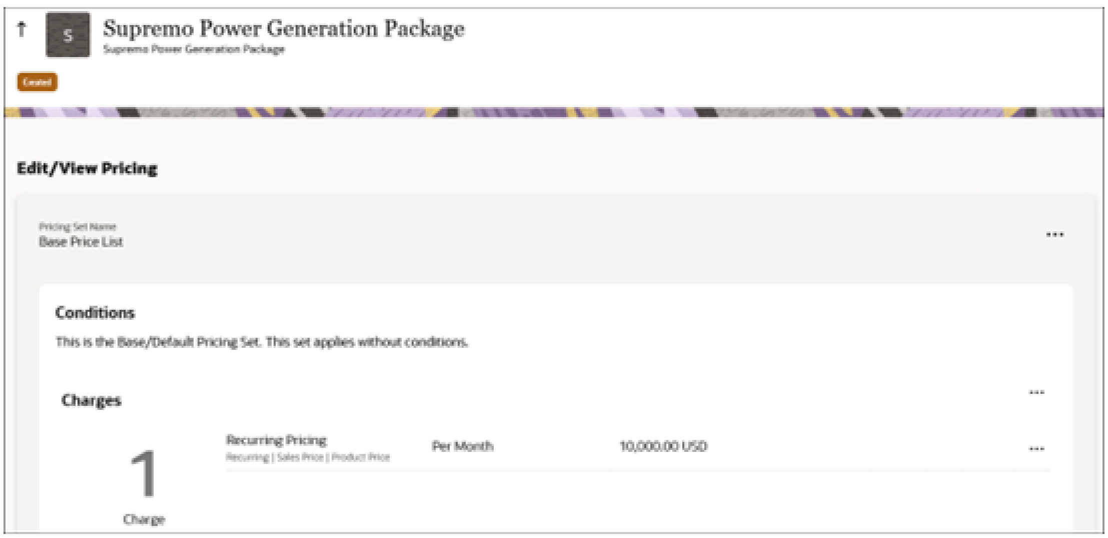

**Note:** The Retire action in the product list page is enabled any time after the product is created. Upon retire, the product status is updated to Retired, the Eligible to Sell attribute for the product is set to No, and therefore the product is no longer available for salespeople to sell.

Specify the pricing set, condition, and charge details, and submit to save the product pricing.

This image shows an example of the Products and Pricing page where you access the Edit/View Pricing page:




In this sample image, in the Edit/View Pricing page, you specify the pricing set, the condition, and charge details for the product:




## Step 7: Launch the Product

Launch the product. Once you price the product, the product status becomes Priced and the Launch action is enabled in the product list page, so that you can launch the product.

After you launch the product, the Eligible to Sell attribute for the product is set to Yes, the product status becomes Launched, and the product is available for salespeople to sell.

*Related Topics*

- How are products synced between the inventory product master and sales?

# 7 Enable Pricing

## Overview of Pricing Integration

For pricing functionality in the Product Workbench, base pricing is supplied and enabled. You can also use pricing attributes to define conditions and create non-base price lists.

See *Base Pricing* in this playbook to learn more about base pricing.

Setting up price lists requires a few more steps. Begin with *Add Price Lists to Your Solution* in this playbook's Set Up Price Lists section.

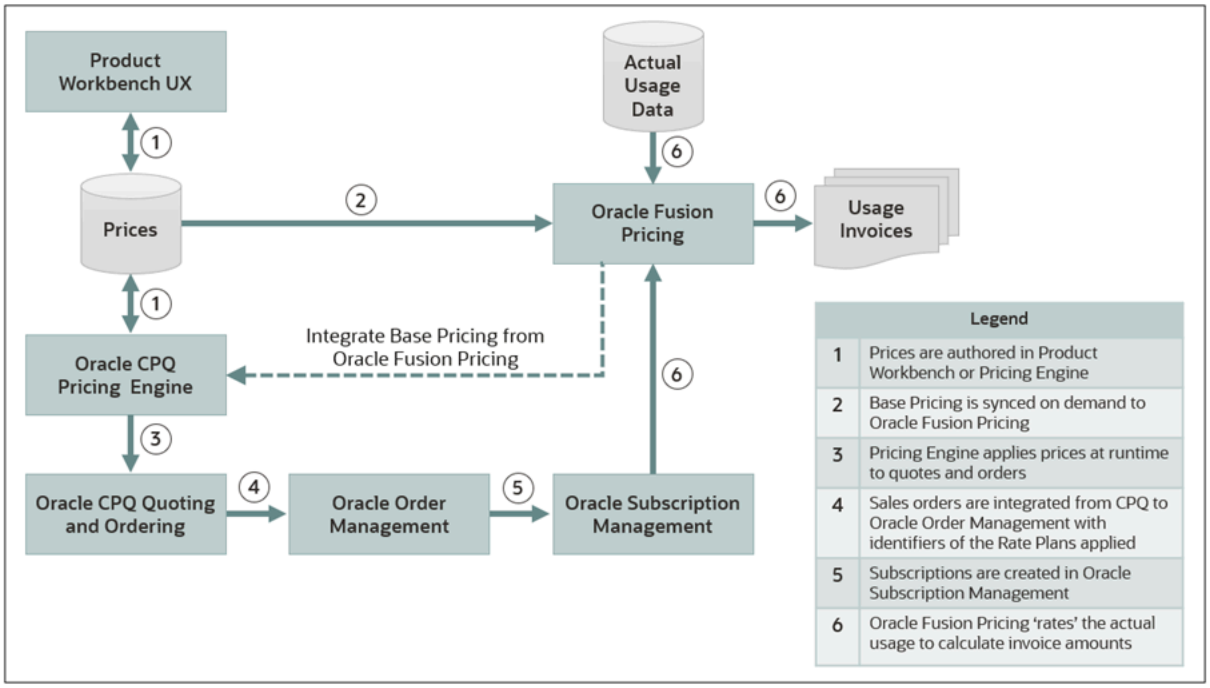
For details not contained in this playbook, see the *Oracle CPQ Pricing Portal*. There you can find descriptions of pricing administration and functionalities, such as:

- Pricing Rules
- Price Models
- Pricing Attributes
- Rate Cards
- Pricing Options
- Pricing Lookups
- Charge Attributes
- Charge Definitions
- Rate Card Templates

This diagram shows the integration points and flow between the Product Workbench, the Oracle CPQ Pricing module, the Oracle CPQ Quoting and Ordering modules, Oracle Order Management, Oracle Subscription Management, and Oracle Fusion Pricing.

Here's the flow depicted in the diagram that follows:

1. You author the prices in the Product Workbench or in the Oracle CPQ Pricing Engine.
2. Base pricing is synced on-demand to Oracle Pricing.
3. The Pricing Engine applies prices at runtime to quotes and orders.
4. Sales orders are integrated from Oracle CPQ to Oracle Order Management, with the identifiers of Rate Plans applied.
5. Subscriptions are created in Oracle Subscription Management.
6. Oracle Pricing "rates" the actual usage to calculate invoice amounts.




*Related Topics*

- Oracle CPQ Pricing Portal
- Overview of Oracle Pricing

# Base Pricing

After you've implemented Oracle Pricing and Oracle CPQ, establish pricing functionality in your Product Workbench by using base pricing.

Your base pricing capabilities include:

- **Rate Plans and Charges:** Set up rate plans with collections of charges that you can apply to subscription product pricing. See *Rate Plans and Charges* and *Use Rate Plans with Your Subscriptions* for details.
- **Rate Cards and Rate Card Templates:** Set up templates and associated rate cards. Rate cards set invoice amounts on periodic charges. See *Rate Cards and Rate Card Templates* for details.

  As part of rate card setup, be sure to add any pricing lookups you need. The navigation path in Setup and Maintenance is: **Pricing** > **Pricing Portal** > **Pricing Lookups** > **Add Pricing Lookup**.
- **Charge Definitions:** Standardize charge categories with charge definitions. See *Charge Definitions* for details.
- **Sync Oracle CPQ with Oracle Pricing:** Sync pricing functions with Oracle Pricing. See the Administration section in *Oracle Pricing Integration*.

**Note:** With base pricing, the pricing integration is one-way, from Oracle Pricing to Oracle CPQ. If you add price list support, then you'll get the increased benefit of a two-way sync between the applications.

To enable the price list synchronization, follow the *Oracle Pricing Integration* information in the *Oracle CPQ Pricing Portal*.

# Set Up Price Lists

## Add Price Lists to Your Solution

Price lists set the price for each item you sell. The Oracle CPQ Pricing integration with Oracle Pricing streamlines price list sync. Oracle CPQ and Oracle Pricing (part of the Oracle SCM suite) work together to give you the added benefits of a two-way pricing sync in your solution.

*Base pricing* provides the sync from Oracle CPQ to Oracle Pricing. After you add price list functionality, Oracle Pricing syncs select price lists to Oracle CPQ, thus giving you a complete sync.

You can sync price lists, list items, charges, and rate plans from Oracle Pricing to Oracle CPQ.

This close integration between Oracle CPQ Pricing and Oracle Pricing lets you bring in Oracle Subscription Management for quotes, orders, and do invoicing. This setup minimizes pricing discrepancies, eliminates manual data entry, and does away with maintaining the same data in more than one location.

### Benefits of Using Price Lists

Setting up price lists gives you several benefits:

- **Simplified access:** Easily access the integration pages directly from the Setup and Maintenance work area.
- **Advanced scheduling:** Create multiple schedules for different price lists, enabling granular control over sync.
- **Intuitive UI:** Enjoy a new, simplified user experience when you schedule price list sync.
- **Advanced filtering:** Utilize advanced mode to define complex criteria for selecting price lists to sync.
- **Efficient monitoring:** Quickly access integration run history for specific schedules.

### Pricing Objects That Are Synced

**Note:** Dynamic pricing (matrix pricing with rate cards) isn't supported.

### Pricing Objects That Are Synced

These Oracle Pricing objects are synced with Oracle CPQ in the integration:

***Objects in Oracle Pricing That Are Synced with Oracle CPQ Pricing***

| Oracle Pricing Object | Oracle CPQ Pricing Object |
| --- | --- |
| Price List | Price Model |
| Price List object | Price Model object |
| Price List object charges | Price Model object charges |

| Oracle Pricing Object | Oracle CPQ Pricing Object |
| --- | --- |
| Price List Item Rate Plan | Price Model Item Rate Plan |
| Price List Component object charges | Price Model object charges |

# Price Lists Setup Overview

You need to do a few steps to set up price list support.

## Setup Checklist for Price List Support

Use this checklist as you set up price list support:

***Setup Checklist for Price List Support***

| Step | Where to Find More Information |
| --- | --- |
| **Step 1: Prerequisites**<br>Ensure that your implementation user has the appropriate role and permissions. | *Prerequisites to Setting Up Price List Support* |
| **Step 2: Enable Data Integration**<br>You need to enable the data integration between Oracle Pricing and Oracle CPQ. | *Enable Data Integration Between Oracle Pricing and Oracle CPQ Pricing* |
| **Step 3: Set Up the Connection to Oracle CPQ**<br>You'll set up a connection to Oracle CPQ. | *Set Up the Connection to Oracle CPQ* |
| **Step 4: Set Up Lookup Codes and Charge Definitions**<br>Make sure that the lookup types and charge definitions you need are created in Oracle CPQ and that the Integration ID field is populated with the corresponding Oracle Pricing field. | *Set Up Lookup Codes and Charge Definitions* |
| **Step 5: Schedule the Pricing Integration Sync**<br>Set up the schedule to sync pricing data. | *Schedule the Oracle Pricing to Oracle CPQ Pricing Sync* |
| **Step 6: View or Cancel Integration Sync**<br>After you've set up the integration, you can view the status of syncs in the Integrations Instances page. You can also cancel an integration sync. | *View or Cancel an Integration Sync* |

*Related Topics*

- Manage Price Lists

# Prerequisites to Setting Up Price List Support

Before you begin the pricing integration setup, ensure you're aware of some prerequisites.

## Ensure Users Have the Necessary Roles and Privileges

The user setting up the pricing integration must have:

- The duty role, Data Integration Management (ORA_ZCA_DATA_INTEGRATION_MANAGEMENT_DUTY)
- The appropriate role and data security to access price lists. Follow the steps in *Set Up Roles and Privileges for Pricing Administrators* to give your user the appropriate pricing roles and data security.

## Understand Predefined Attribute Mappings for Price Lists

Be sure you understand what's predefined for price list attribute mappings. Here's how:

1. Sign in as a setup user.
2. In Setup and Maintenance, search for and select the **Manage Data Integrations** task.
3. In the Data Integration Management page, select **Manage Integration Maps**.
4. Select the **Synchronize Prices items with CPQ** map.
5. In the map's details page, review the predefined attribute mappings between Oracle Pricing and Oracle CPQ Pricing.

**Note:** You can't modify the predefined attributes.

# Enable Data Integration Between Oracle Pricing and Oracle CPQ Pricing

You must enable the data integration between Oracle Pricing and Oracle CPQ.

To enable the integration:

1. As an administrator, navigate to Setup and Maintenance and search for the **Manage Administrator Profile Values** task.
2. Search for the profile option code, ORA_ZCA_ENABLE_DATA_INTEGRATION.
3. Set the profile option value to Yes.

# Set Up the Connection to Oracle CPQ

Set up a connection to Oracle CPQ using the Data Integrations page:

1. Sign in as a setup user.

2. In Setup and Maintenance, search for and select the **Manage Data Integrations** task.
3. In the Data Integration Management page, select **Manage Connections**.
4. Edit the `CPQ` connection.
5. In the Edit Connection Details page, update these fields:
   - **Description:** Enter a description.
   - **Endpoint URL:** Enter the Oracle CPQ environment URL.
   - **URI Version:** Use `v17`.
   - **Authentication Type:** Use `Basic`.
   - **User Name and Password:** Enter your Oracle CPQ administrator credentials.

# Set Up Lookup Codes and Charge Definitions

Before starting the pricing sync from Oracle Pricing to Oracle CPQ, ensure that the lookup types and charge definitions you're going to use are created in Oracle CPQ. You may have already created some of these as part of another setup flow.

## Price Type Lookups

Identify the price types you're going to use and then set them up:

1. As a pricing administrator, go to Setup and Maintenance and search for and select the **Manage Pricing Lookups** task.
2. Search for the lookup code, ORA_QP_PRICE_TYPES.
3. Copy the lookup codes for all the price types you're using.
4. Navigate to **Oracle CPQ** > **Admin** > **Pricing Portal** > **Pricing Lookups** > **Price Types**.
5. For the price types you identified, if a record already exists, edit the record and update the **Integration ID** with the corresponding lookup code.
6. For the price types that don't exist in Oracle CPQ, create a record and make sure you populate the Integration ID field with the lookup code you copied for each corresponding price type.

## Charge Types

Since you can add custom charge types in Oracle Pricing, you first need to identify all of the charge types that you're using in the price lists that you want to sync with Oracle CPQ. After you've identified the charge types you'll need:

1. As a pricing administrator, go to Setup and Maintenance and search for and select the **Manage Pricing Lookups** task.
2. Search for the lookup code, ORA_QP_CHARGE_TYPES.
3. Copy the lookup codes for the charge types that you identified previously.
4. Navigate to **Oracle CPQ** > **Admin** > **Pricing Portal** > **Pricing Lookups** > **Charge Types**.
5. For the charge types you identified, if a record already exists, edit the record and update the Integration ID with the corresponding lookup code.
6. For the charge types that don't exist in Oracle CPQ, create a record and make sure you populate the Integration ID field with the lookup code in Pricing.

**Important Information About Charge Type Differences Between Oracle Pricing and Oracle CPQ:**

- Oracle Pricing has charge types and charge subtype lookups, but Oracle CPQ only has charge types.
- The combination of price type and charge type must be unique when creating a charge definition in Oracle CPQ.

- Thus, when creating charges and rate plans in Oracle Pricing price lists that you want to sync to Oracle CPQ, make sure that you only use one subtype for a charge type.

## Charge Definitions

Pricing Charge Definitions are required when defining charges and rate plans in Fusion Pricing. Because you can create custom charge definitions, it's best to identify all the charge definitions used in your Fusion Pricing setup. You can find them by going through your charges and rate plans.

1. After you've identified them, in Setup and Maintenance, navigate to the Manage Pricing Charge Definitions task.
2. Search for the charge definitions used in your pricing setup. For each definition, note the charge definition code, price type, and charge type.
3. Navigate to **Oracle CPQ** > **Admin** > **Pricing Portal** > **Pricing Lookups** > **Charge Definitions**.
4. For the charge definitions you identified, if a record already exists, edit the record and update the Integration ID with the corresponding charge definition code (make sure that the price type and charge type match to what you noted before).
5. For the usage UOMs that don't exist in Oracle CPQ, create a record and make sure that you populate the price type, charge type and Integration ID with what you noted in Fusion Pricing. Populate the other attributes with appropriate values.

See *Charge Definitions in Oracle CPQ online help* for more information.

*Related Topics*

- Manage Pricing Lookups
- Manage Pricing Charge Definitions
- Pricing Lookups in Oracle CPQ online help
- Pricing Options in Oracle CPQ online help
- Charge Definitions in Oracle CPQ online help

# Schedule the Oracle Pricing to Oracle CPQ Pricing Sync

Set up the schedule to sync pricing data from Oracle Pricing to Oracle CPQ Pricing.

## Prerequisites

To schedule the pricing integration, you need access to price lists defined in the system. Pricing administrators have this access. In addition to the information in this playbook section, see *Set Up Roles and Privileges for Pricing Administrators* in the *Administering Pricing* guide.

## Overview of Steps

Here's an overview of the steps. To see specific steps for either the quick schedule or advanced schedule options, see the remaining sections in this topic.

1. Sign in as a setup user.
2. In Setup and Maintenance, search for and select the **Manage Data Integrations** task.
3. In the Data Integration Management page, select **Schedule Integrations**.
4. In the Schedule Integrations page, you can see the integration syncs that exist. Click **Actions**.

5. Select either **Quick Schedule** or **Advanced Schedule**:
   - **Quick Schedule:** Use this action if you want one page to quickly schedule the integration.
   - **Advanced Schedule:** Use this action if you want to use some advanced conditions to schedule the integration.
6. Once submitted, you should see the integration in the list page.

After you've set up the integration, you can view the status in the Integrations Instances page. You can also cancel the integration. See *View or Cancel an Integration Sync* for more information.

## Use Quick Schedule

1. **Object Type:** Select **Price List**.
2. **Integration Map:** Select the available one, **Synchronize Prices items with CPQ**.
3. Select one or more **price list names** that you want to sync with Oracle CPQ.
4. **Frequency:** Provide the time between runs, start date and time, and end date and time (if you're not setting up a one-time run).

## Use Advanced Schedule

1. **Integration Details:**
   a. Provide a name for your schedule.
   b. Select the **Integration Map** Synchronize Prices items with CPQ.
2. **Integration Criteria:** Provide a criteria to determine which price lists to sync:
   a. Click **Add Group**.
   b. Inside the group, click **Add**.
   c. Select the price list attribute that you want to use to determine which price list to sync, for example, select **Name**.
   d. Select the appropriate operator.
   e. Select the appropriate value.

   > **Note:** You can add more conditions by clicking the plus sign. If you have more than one condition, you can indicate whether price lists satisfying all the conditions or any of the conditions should be synced with Oracle CPQ. If you have really complex conditions, you can include multiple groups of conditions.

3. **Integration Schedule:**
   - **Frequency:** Provide the time between runs, start date and time, and end date and time (if you're not setting up a one-time run).
4. Submit the schedule.

# View or Cancel an Integration Sync

After you've set up the integration, you can view the sync status in the Integrations Instances page. You can also cancel a sync.

## View Integration Instances and Statuses

To see integration instances and statuses, as the administrative user, navigate to the Integrations Instances page:

1. Sign in as a setup user.
2. In Setup and Maintenance, search for and select the **Manage Data Integrations** task.

3. In the Data Integration Management page, select **Schedule Integrations**.
4. In the Schedule Integrations page, you can see the integration syncs that exist, click **Actions** > **View Integration Instances**.
5. To see all of the integration runs you've scheduled in the past, navigate to the Data Integration Management page and click the **View Integration Status** card.

## Cancel an Integration

To cancel an integration you just scheduled:

1. Sign in as a setup user.
2. In Setup and Maintenance, search for and select the **Manage Data Integrations** task.
3. In the Data Integration Management page, select **View Integration Status**.
4. In the Integration Instances page, click **Actions** > **Cancel**.

# 8 Enable Oracle Subscription Management Integration

## Overview of Oracle Subscription Management

It's assumed in this guide that you've implemented Oracle Subscription Management (product code OSS) before beginning additional integrations. Contact your Oracle salesperson for more details.

You can find implementation details in the *Implementing Subscription Management* guide available on the *Oracle Help Center Subscription Management* pages.

## Subscription Management Integration

### Overview of Oracle Subscription Management Integration

Oracle's Revenue Transformation Solution combines Oracle Sales, Oracle CPQ, and Oracle Subscription Management – plus a host of Oracle's other revenue operations applications – to establish and accurately manage sales targets, sell any combination of products and services on a subscription basis, and provide global visibility into sales performance and revenue reporting.

Integration with Oracle Commerce provides streamlined self-service buying experiences that leverage Oracle CPQ and back-office capabilities, and drive revenue.

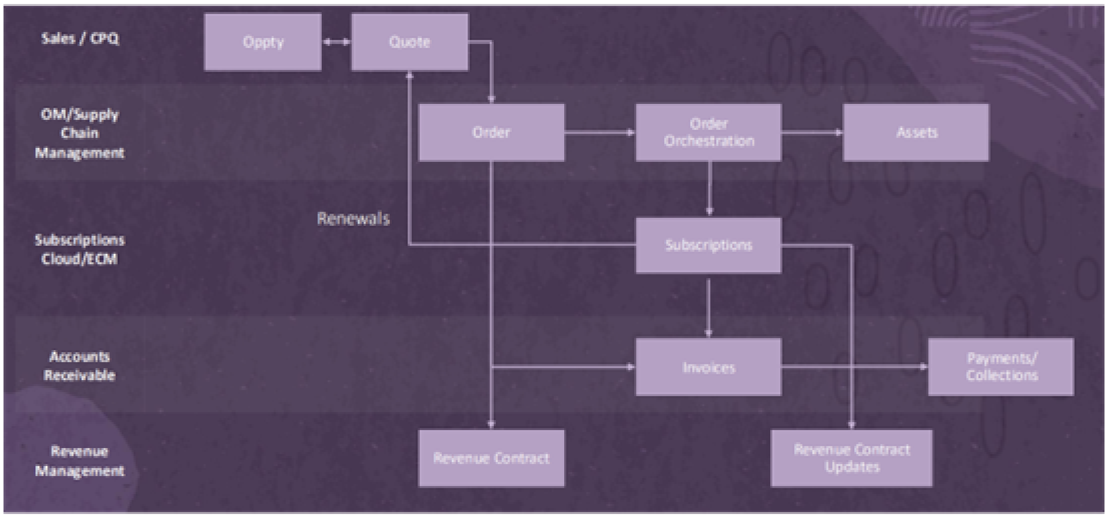
Oracle Subscription Management allows organizations to build predictable, recurring revenue models by providing an end-to-end subscription solution that manages renewals and billing and revenue recognition, and that also informs customer-facing personnel with a complete view of purchasing behavior.

As part of the end-to-end subscription solution, Oracle CPQ provides an integration with the Oracle Subscription Management application. This close integration lets customers create and manage products and services they sell using a subscription model. This subscription model supports the ability to manage a given product or service as a recurring or usage-based price item. Leveraging this integration, customers can enable their sales teams to capture subscription orders and perform both new and renewal subscription management activities throughout the lifecycle of these customer relationships.

The integration, enabled by Oracle's next generation Oracle Integration Cloud (OIC) middleware, comes with a Subscription Management package that includes installable artifacts for both Oracle CPQ and OIC.

#### Subscription and Coverage Services Sales Process

This diagram shows the flow for Goods and Subscription - Launch to Revenue:




## Subscriptions Use Case Scenario

The following use cases are covered in this topic:

- New Subscription Sales
- Subscription Renewals

### New Subscription Sales

New subscription sales flows include:

- Subscription services
- Coverages

Oracle Subscription Management provides a complete solution to sell subscriptions, services, and usage-based products that include tangible items, such as periodic copier ink delivery, or intangible items, such as complex usage-based software subscriptions.

Add subscription products for a one-time sale, recurring sales, or usage-based consumption of items associated with subscriptions over a period. Subscription products can include serviceable items and pricing terms within each line. Items can be both tangible and intangible in the lines. After creating a subscription product, you can review the billing schedule of each item within the product.

Coverage lines describe the type of service required for covered assets within the line. They can include serviceable inventory items, with the sales product type as extended warranty, preventive maintenance, or software maintenance, or service-level agreements. Assets can be specified as serialized or nonserialized assets. For a serialized asset, such as a laptop or a printer, the asset is always an individual product. An asset can represent multiple quantities for nonserialized items. Assets include both customer assets and customer-related assets.

Add coverage products that include the setup and maintenance of serviceable items for a specific period. Covered levels can be of type asset, product, party, customer account, party site, asset group, and product group.

For more information see the *Configure Subscriptions* and *Coverage Services* chapters in the *Implementing Subscription Management* guide on the *Oracle Help Center Subscription Management* pages.

### Subscription Renewals

Different flows make up the subscription renewal scenario:

- Manual (ad-hoc) Renewals: These include quote-initiated, opportunity-initiated, and buyer -initiated (self-service).
- Automated Renewals: These include salesperson-assisted renewals with a customer-acceptance-driven renewal flow.

Subscriptions can be renewed either manually or automatically. A subscription user can manually renew subscriptions using the Renew action, or you can configure the application to automatically renew subscriptions. Renewal rules determine the default renewal actions.

To know more about renewals, see *How do subscriptions automatically or manually renew?* and *How do I create and manage subscription renewal templates? Implementing Subscription Management* guide available on the *Oracle Help Center Subscription Management* pages.

## Set Up Subscription Management Integration with Oracle CPQ

The Oracle CPQ-Subscription Management integration package comes with the following artifacts that are required to complete the integration set up based on your business requirement:

- *Oracle CPQ with Subscription Management Integration Guide*: This document has detailed instructions on setting up the integration.
- *Integrating Oracle Sales with Oracle CPQ Guide* to support standard B2B selling processes.
- Oracle Customer Data Management (CDM) for customer account information. See the *CDM pages on Oracle Help Center* for more information.
- Oracle Product Information Management (PIM) with parts synced between Oracle CPQ and Subscription Management. For more information, see the *Implementing Product Management* guide and other materials on the *Oracle Supply Chain & Manufacturing pages on Oracle Help Center*.
- Oracle Asset-Based Ordering (ABO) flow with BOM Mapping and ABO setup. For more information, see the *Integrating with Oracle Commerce* guide available in the *Oracle Commerce pages on Oracle Help Center*.

## Set Up Subscription Management Integration with Oracle Order Management

The Integrate Order Management with Subscriptions feature lets you bring your orders in from a third-party system, with products and subscriptions or coverages, into Oracle Order Management, and then use the orchestration flow to send them to the appropriate fulfillment system at the correct time.

In this flow, all revenue data is communicated to Oracle Revenue Management for revenue capture and management.

Pricing for subscriptions and coverages can include one-time and recurring charges.

For subscriptions, you can use rate plans to facilitate usage charges. In addition, one order line can have multiple charges, for example, a line might have a one-time activation fee and recurring monthly charges.

Here's an example of the functionality brought through the integration:

- A customer orders a phone with a coverage plan and a subscription for the phone service.
- The coverage and the subscription are associated with the phone.
- After the phone is shipped to the customer, the subscription for the coverage and phone service gets sent to Subscription Management for processing.
- The subscription can have one-time, recurring, and usage charges.
- For the coverage services, it can have one-time and recurring charges.

To learn more about how to manage the integration between Oracle Order Management and Oracle Subscription Management, see *Overview of Integrating Order Management with Subscription Management*.

# 9 Enable Oracle Commerce Integration

## Overview of Oracle Commerce

Oracle Commerce is a scalable, flexible e-commerce solution designed specifically to run in the Oracle Cloud. The service provides the infrastructure and tools necessary to build a highly customizable, feature-rich storefront for your business.

> **Note:** This topic applies to Open Storefront Framework (OSF) and Storefront Classic.

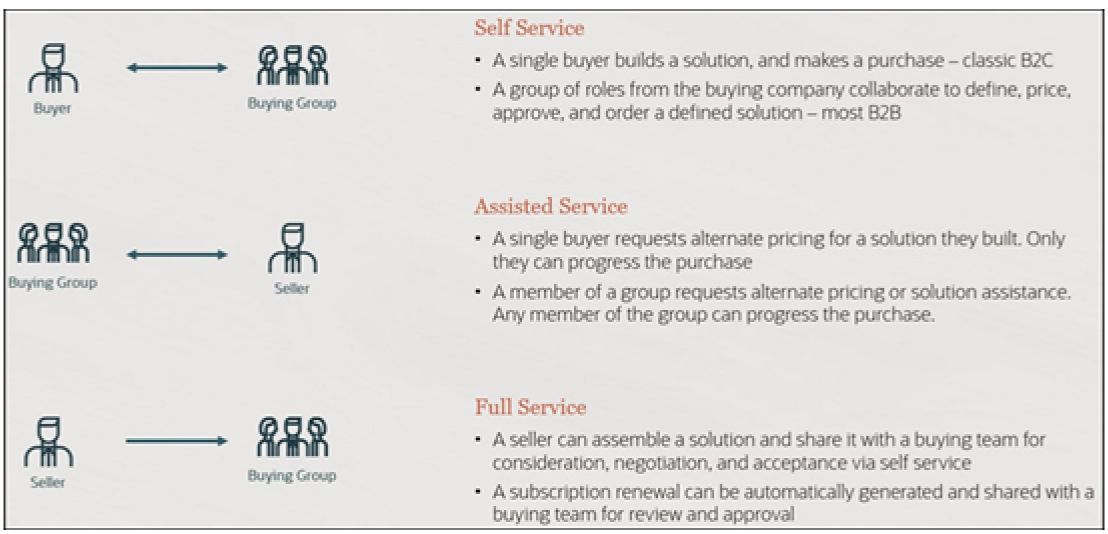
Commerce includes the following core pieces:

- The Commerce administration UI, which you use to design and manage your store. You access it through the URL given to you by Oracle when you subscribe to the service. The URL is similar to the following:

  `<youroracledomain.com>/occs-admin/#`

- Your storefront, located at the URL Oracle provides. Initially you're provided with a test version of the site, which you modify through the administration UI to create your own store.

This image can help you understand the system:




Oracle Commerce provides several sets of tools that you can use to extend the capabilities of the system. The primary ones are these:

- Developer features for extending the capabilities of your store, including a set of REST APIs and tools for customizing widgets. See *Understand Extension Features*, *Understand the Open Storefront Framework*, and *Build a widget*.
- Integrations with third-party vendors (for example, tax calculation services and payment processors) and other Oracle Cloud services. For more information on the integrations available, see the *Oracle Help Center page* for Commerce.
- An extensive set of REST APIs allows external applications to make calls into the Commerce server. These APIs are supplemented by web hooks that the server can use to make calls out to external applications. For example,

you can create an integration with an order management system (OMS) in which Commerce uses web hooks to send order data to your OMS, and the OMS uses the Commerce REST APIs to update the order's status information as the order is processed.

- Custom widgets allow you to extend the functionality of your storefront by communicating with the Commerce server to access features that aren't exposed by default. Custom widgets can also enhance the storefront by communicating with external systems, such as social media sites.

Note that these tools aren't mutually exclusive; you might need to use all of them to accomplish your objectives. For example, a custom widget might make a REST call to the Commerce server to request data for the storefront, and the server might then execute a web hook to obtain that data from an external system.

For general information about developing custom widgets, see *Create Custom Widgets* (for Open Storefront Framework).

# Business Process Flow

The business flow between Commerce and Oracle CPQ goes from Commerce to Oracle CPQ and then back into Commerce and finally to an ordering system like Oracle Order Management.

Here's the high-level flow:

- The buyer starts the request for a quote in Commerce.
- The solution discovery is started in Oracle CPQ.
- The quote is negotiated and approved, at which time the quote is published through Oracle CPQ.
- The buyer in Commerce can:
  - Reject the quote
  - Accept the quote, at which time in Oracle CPQ, the agent requests a customer signature which signals final acceptance and the product is ordered
  - Request a revision to the quote, at which time negotiation starts again

# Setup Checklist

Incorporating Oracle Commerce into your Revenue Transformation solution involves many setup steps.

**Note:** The steps and related, linked information listed in the following table summarize the setup steps you need to take to integrate Oracle Commerce into your Revenue Transformation solution. The links point to individual topics in this chapter that summarize the setups or requirements. However, you can find all the information you need in the *Oracle Commerce Setup Guide Series* material on Oracle Support.

***Oracle Commerce Integration Setup Checklist***

| Step | Where to Find More Information |
| --- | --- |
| **Step 1: Ensure prerequisites are met** | For a summary, see: *Ensure Prerequisites Are Met* |

| Step | Where to Find More Information |
|---|---|
| Several prerequisites exist for the integration, so review them and ensure they're met. | |
| **Step 2: Get the Self Service Portal enabled on Commerce**<br><br>To get the Self Service Portal enabled, you'll log a service request with Oracle Support. | For a summary, see: *Get the Self-Service Portal Enabled on Oracle Commerce* |
| **Step 3: Set up Oracle Commerce and Oracle CPQ for self service**<br><br>You need to set up Commerce and Oracle CPQ for the self-service features of Commerce. | For a summary, see: *Set Up the Integration of Oracle Commerce and Oracle CPQ for Self Service* |
| **Step 4: Set up Oracle Commerce and Oracle Fusion for self service**<br><br>You need to set up Commerce and Fusion for the self-service features of Commerce. | For a summary, see: *Set Up the Integration of Oracle Commerce and Oracle Fusion for Self Service* |
| **Step 5: Set up Oracle CPQ for self service**<br><br>You need to set up Oracle CPQ for the self-service features of Commerce. | For a summary, see: *Set Up Oracle CPQ for Self-Service* |
| **Step 6: Set up Commerce for self service**<br><br>You need to set up Oracle Commerce to use self-service features. | For a summary, see: *Set Up Oracle Commerce for Self-Service* |
| **Step 7: Set up self-service in Commerce and Oracle CPQ**<br><br>Set up Oracle CPQ and Commerce for self-service features. | For a summary, see: *Set Up Self-Service in Oracle Commerce and Oracle CPQ* |

You may also want to consult the *Integrating with Oracle Commerce* guide available in the *Oracle Commerce pages on Oracle Help Center*.

# Ensure Prerequisites Are Met

The Oracle Commerce Self-Service Portal integrates with Oracle CPQ and Oracle Fusion systems using an integration user. The user needs Oracle Identity Cloud Service (IDCS) information to connect with the Oracle Fusion and Oracle CPQ systems.

The user doing the setups needs different access for different setups. In general, the user needs these accesses:

- Identity Domain Administrator or the Application Administrator role access to IDCS. The user must be able to create and manage users and applications.
- Security user access in Oracle Fusion. The user must be able to create and manage roles and users in Oracle Fusion.
- Full access to Oracle CPQ. The user must be able to create and manager users, manage integrations like OAuth, Oracle Fusion integrations, and so on, and be able to set up in BMContext if needed.
- Service administrator access in OIC. The user must be able to manage and configure integrations.
- Administrator access in Oracle Commerce. The user must be able to create Registered Applications and Manage Integrations in Commerce.

# Get the Self-Service Portal Enabled on Oracle Commerce

To get the Self-Service portal enabled for Oracle Commerce, raise a service request with Oracle Support.

# Set Up the Integration of Oracle Commerce and Oracle CPQ for Self Service

Setting up the integration of Oracle Commerce and Oracle CPQ for self-service, at a high level, involves these steps:

1. Ensure prerequisites are met.
2. Set up an integration user in IDCS and Oracle CPQ.
3. Set up applications (resource and client) in IDCS for the Oracle CPQ integration.
4. Validate the Commerce-OracleCPQ integration settings and verify the Commerce-OracleCPQ connection.

> **Note:** This topic summarizes the required steps. For more information, see the *Oracle Commerce Setup Guide Series* material on Oracle Support.

# Set Up the Integration of Oracle Commerce and Oracle Fusion for Self Service

Setting up the integration between Commerce and Fusion for self-service, at a high level, involves these steps:

1. Ensure prerequisites are met.
2. Set up an integration user in Fusion.

3. Set up a client application in IDCS for the Fusion integration.
4. Validate the Commerce-Fusion integration settings and verify the Commerce-Fusion connection.

**Note:** This topic summarizes the required steps. For more information, see the *Oracle Commerce Setup Guide Series* material on Oracle Support.

# Set Up Oracle CPQ for Self-Service

Here are the high-level steps to enable Oracle CPQ for the self-service features of Oracle Commerce:

1. Enable Commerce self-service checkout for buyer-accepted quotes.
2. Enable sharing of proposal documents with Commerce buyers.

**Note:** This topic summarizes the required steps. For more information, see the *Oracle Commerce Setup Guide Series* material on Oracle Support.

# Set Up Oracle Commerce for Self-Service

You need to set up Oracle Commerce to use the self-service features.

At a high level, here's what you need to do:

1. Sync accounts and contacts from Oracle Sales to Oracle Commerce, including:
    - Set up Oracle Commerce integration with Oracle Sales through OIC.
    - Map accounts and contacts and establish relationship mapping between accounts and contacts.
2. Sync Oracle CPQ Parts with Oracle Commerce Products.
3. Let Oracle Commerce use Oracle CPQ as the Pricing Master.
4. Set up buying in Oracle Commerce.
5. Set up Oracle CPQ process information in Oracle Commerce.
6. Set up the new OSF reference store.

**Note:** This topic summarizes the required steps. For more information, see the *Oracle Commerce Setup Guide Series* material on Oracle Support.

# Set Up Self-Service in Oracle Commerce and Oracle CPQ

Setting up self-service in Oracle Commerce and Oracle CPQ, at a high level, involves these steps:

1. Ensure prerequisites are met.

2. Set up proposals (seller-initiated quotes) in Oracle Commerce and Oracle CPQ.
3. Enable request for quote and generate proposal.
4. Set up Oracle Commerce-Oracle CPQ native integration for configuration of products.

**Note:** This topic summarizes the required steps. For more information, see the *Oracle Commerce Setup Guide Series* material on Oracle Support.

# 10 Additional Integrations

## Integrate with Oracle ERP Applications

We've already mentioned the Oracle CPQ integration, which is significant to the total Revenue Transformation Solution. Additionally, several Oracle ERP applications provide increased functionality to round out the solution.

### Oracle Order Management Integration

Oracle Order Management provides a multitude of product ordering and supply chain features, including:

- Capture customer demand and fulfill sales orders using multiple channels, such as the web, call centers, direct sales, mobile, and partners.
- Set up your item in Product Information Management.
- Price the item in Pricing Administration.
- Set up integrations, specify default values, specify application behavior, and do other setups in Setup and Maintenance.
- Specify how to determine availability for your item in Oracle Global Order Promising.
- Configure your configured items in Configurator.
- Use Oracle applications and their work areas to orchestrate order fulfillment across sources, such as suppliers, finance, and distribution centers.
- Track and revise sales orders.
- Procure items that you will ship in Oracle Procurement.
- Reserve and track the item in Oracle Inventory Management.
- Get details about the item in Reports and Analytics.
- Receive the item into accounting in Oracle Receivables.

See *Oracle Order Management Integration* for more information.

### Oracle Receivables and Oracle Revenue Management

Use Oracle Receivables and Oracle Revenue Management to:

- Manage both customer information and customer account activities
- Manage automated customer billing
- Process customer payments
- Manage funds capture
- Manage accounts receivable balances
- Manage revenue for receivables
- Manage bills receivable

- Recognize and adjust revenue
- Create credit profiles for your customers
- Address the ASC 606 and IFRS 15 accounting standard Revenue from Contracts with Customers
- Manage contracts
- Manage standalone selling prices

For more information on these integrations, see the Oracle Cloud Applications Financials documentation on *Oracle Help Center*.

Additionally, see the following Oracle CPQ integration with Order Management and Subscription Management documentation:

- *Overview of Standard Quote Process*
- *Oracle Order Management Integration*
- *Order Management Integration Guide, Standard Process Update 23B or Later*
- *Oracle Subscription Management Integration*
- *Oracle CPQ with Subscription Management Integration Guide*