

# Oracle® Cloud

## Create Oracle CPQ Transactions for Oracle Intelligent Advisor Interviews



G11939-02  
July 2025



Oracle Cloud Create Oracle CPQ Transactions for Oracle Intelligent Advisor Interviews,  
G11939-02

Copyright © 2024, Oracle and/or its affiliates.

Primary Author: Oracle Corporation

# Contents

|   |                                                     |   |
|---|-----------------------------------------------------|---|
| 1 | About This Recipe                                   |   |
|   | Overview                                            | 1 |
|   | System and Access Requirements                      | 1 |
| 2 | Before You Install the Recipe                       |   |
|   | Configure Oracle Intelligent Advisor                | 1 |
|   | Configure Oracle CPQ                                | 1 |
| 3 | Install and Configure the Recipe                    |   |
|   | Configure the Oracle Intelligent Advisor Connection | 1 |
|   | Configure the Oracle CPQ Connection                 | 1 |
|   | Configure the Lookup Table                          | 2 |
|   | Update Integration Properties                       | 2 |
| 4 | Activate and Run the Recipe                         |   |

# Preface

This document describes how to install, configure, and run this recipe in Oracle Integration 3.

## Topics:

- [Documentation Accessibility](#)
- [Diversity and Inclusion](#)
- [Related Resources](#)
- [Conventions](#)

## Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

### Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

## Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

## Related Resources

For more information, see these Oracle resources:

- Oracle Integration documentation on the Oracle Help Center.
- Oracle Cloud at <http://cloud.oracle.com>.

## Conventions

The following text conventions are used in this document.

| Convention      | Meaning                                                                                                                        |
|-----------------|--------------------------------------------------------------------------------------------------------------------------------|
| <b>boldface</b> | Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary. |

| Convention    | Meaning                                                                                                                                |
|---------------|----------------------------------------------------------------------------------------------------------------------------------------|
| <i>italic</i> | Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.                          |
| monospace     | Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter. |

# 1

## About This Recipe

Use this recipe to create transactions in Oracle CPQ for Oracle Intelligent Advisor interviews.

### Note

This recipe is available as **Oracle Intelligent Advisor — Oracle CPQ | Create Transactions for Interviews** in Oracle Integration. Oracle provides this recipe as a sample only. The recipe is meant only for guidance, and is not warranted to be error-free. No support is provided for this recipe.

## Overview

This recipe creates a corresponding transaction in Oracle CPQ from information based on an Oracle Intelligent Advisor interview.

To use the recipe, you must install the recipe and configure the connections and other resources within it. When a customer launches an interview form in Oracle Intelligent Advisor, the first integration flow gets triggered in Oracle Integration. The integration then loads product catalog (items and quantity) from Oracle CPQ in the interview form. In Oracle Intelligent Advisor, the customer completes the form by entering personal details (such as first name, last name, email), choosing the required items and quantity (that are loaded from Oracle CPQ) and then submitting the form. Subsequently, the second integration flow gets triggered and it creates a corresponding new transaction in Oracle CPQ based on the details submitted by the customer in the Oracle Intelligent Advisor interview form. An email with quotation based on the items and quantities selected in the interview form is also sent to the customer.

## System and Access Requirements

- Oracle Integration, Version 24.08 or higher
- Oracle Intelligent Advisor
- An account on Oracle Intelligent Advisor with the Administrator role
- Oracle CPQ
- An account on Oracle CPQ with the Administrator role

# 2

## Before You Install the Recipe

You must perform the following configuration tasks on your Oracle Intelligent Advisor and Oracle CPQ instances in order to successfully connect to these external systems using Oracle Integration and create Oracle CPQ transactions for Oracle Intelligent Advisor interviews.

### Configure Oracle Intelligent Advisor

To access Oracle Intelligent Advisor using Oracle Integration and create Oracle CPQ transactions for Oracle Intelligent Advisor interviews, you must perform certain configurations on your Oracle Intelligent Advisor instance.

1. Import the project into Policy Modeling, the interview designer.  
Download the sample project file to import - [Customer Product Quote.zip](#).
2. Deploy the project into Oracle Intelligent Advisor Hub.
3. [Create a connection to Oracle Integration from Intelligent Advisor Hub](#) using OAuth.
4. [Create a confidential application to connect to Oracle Integration](#).

For more information, see [Use the Intelligent Advisor adapter for interviews](#).

### Configure Oracle CPQ

To access Oracle CPQ using Oracle Integration, you must perform certain configurations on your Oracle CPQ instance.

Log in to your Oracle CPQ instance as an **Administrator** and perform the following tasks.

1. Create a user account for Oracle Integration.
2. Obtain the REST Catalog URL. See Prerequisites for Creating a Connection.


# 3

## Install and Configure the Recipe

On your Oracle Integration instance, install the recipe to deploy and configure the integration and associated resources.

1. On the Oracle Integration Home page, in the **Get started** section, click **Browse store**.
2. Find the recipe you want to install, then click **Get**.

A message confirms that the recipe was successfully installed, and the recipe card shows **In use**.

3. Click **Configure**  on the recipe to configure its resources.

The project workspace opens, displaying all the resources of the recipe. Configure the following resources before you activate and run the recipe.


## Configure the Oracle Intelligent Advisor Connection

1. In the Connections section, click the connection name.
2. In the Properties section, specify the Oracle Intelligent Advisor base URL in the **Intelligent Advisor Hub URL** field. For example: `https://{your_site_interface}/opa-hub`
3. In the Security section, enter the following details:

| Field                   | Information to Enter                                                        |
|-------------------------|-----------------------------------------------------------------------------|
| <b>Security Policy</b>  | Select <b>OAuth Client Credentials</b> .                                    |
| <b>Access Token URI</b> | Enter <code>https://{your_site_interface}/opa-hub/api/{version}/auth</code> |
| <b>Client Id</b>        | The name of the API client in Intelligent Advisor Hub.                      |
| <b>Client Secret</b>    | The password for the API client in Intelligent Advisor Hub.                 |

4. Click **Save**. If prompted, click **Save** again.
5. Click **Test** to ensure that your connection is successfully configured. In the resulting dialog, click **Test** again.

A message confirms if your test is successful.

6. To return to the project workspace, click **Go back** .

## Configure the Oracle CPQ Connection

1. In the Connections section, click the connection name.
2. In the Properties section, enter the following details:

| Field                  | Information to Enter                            |
|------------------------|-------------------------------------------------|
| <b>Connection Type</b> | Select <b>REST Catalog URL</b> .                |
| <b>Connection URL</b>  | Enter the base URL of your Oracle CPQ instance. |




3. In the Security section, enter the following details:

| Field                  | Information to Enter                                                                          |
|------------------------|-----------------------------------------------------------------------------------------------|
| <b>Security Policy</b> | Select <b>Username Password Token</b> .                                                       |
| <b>Username</b>        | Enter the user name of the account created for Oracle Integration on the Oracle CPQ instance. |
| <b>Password</b>        | Enter the password of the account created for Oracle Integration on the Oracle CPQ instance.  |


4. Click **Save**. If prompted, click **Save** again.
5. Click **Test** to ensure that your connection is successfully configured. In the resulting dialog, click **Test** again.

A message confirms if your test is successful.

6. To return to the project workspace, click **Go back** .


## Configure the Lookup Table


The recipe contains the following lookup tables: **ORCL-BRT-CPQ\_STATE\_LOOKUP** and **ORCL-BRT-CPQ\_COUNTRY\_LOOKUP**.

1. In the Lookups section, click the lookup name.
2. Edit the lookup tables with appropriate values.
  - The **ORCL-BRT-CPQ\_STATE\_LOOKUP** lookup table contains state code and state name. If you have Customers which have addresses that contain different states than the ones present in the lookup, add them in the lookup table.
  - The **ORCL-BRT-CPQ\_COUNTRY\_LOOKUP** lookup table key-value pairs of country code and country description. If you have Customers which have addresses that contain different countries than the ones present in the lookup, add them in the lookup table.
3. Click **Save**. If prompted, click **Save** again.
4. To return to the project workspace, click **Go back** .

## Update Integration Properties

Update the integration properties of the integration flows in the recipe.

1. In the Integrations section, click **Actions**  on the **Oracle IA CPQ Save CPQ Transaction** integration flow, then select **Update property values**.
2. In the Update property values panel, update the **pricebookvarname** integration property by providing a valid price book name in the **New value** field.
3. Click **Submit**.

A message confirms that the integration property has been updated successfully.
4. In the Integrations section, click **Actions**  on the **Oracle IA CPQ Load CPQ Transaction** integration flow, then select **Update property values**.
5. In the Update property values panel, update the following integration properties.
  - **pricebookvarname**: This integration property holds the price book name.

- **limit:** This integration property holds the requested page size. The property sets the limit for the maximum number of elements that the collection should return.
- **offset:** This integration property holds the offset of the page. By default, the offset value is zero which means that the first page will be returned.
- **q:** This integration property holds the product/item name. For example: AS09743 - Vision Cloud 250gb Backup.

6. Click **Submit**.

A message confirms that the integration properties have been updated successfully.

# 4

## Activate and Run the Recipe

After you've configured the connections and other resources, you can activate and run the recipe.

1. In the project workspace, click **Activate**. In the Activate project panel, with the default project deployment selected, choose an appropriate tracing option, then click **Activate**.

A message confirms that the integrations have been activated. Refresh the page to view the updated status of the integrations.

2. Run the recipe.

- a. Log in to your Oracle Intelligent Advisor instance and launch an interview.

This triggers the **Oracle IA CPQ Load CPQ Transaction** integration flow which loads the product catalog (products and quantity) from Oracle CPQ Cloud into the interview's Product page.

- b. Enter customer information such as first name, last name, email, phone, address on the Customer page, and click **Next**.

To test the recipe, you can enter your email in the customer email address field. This will ensure that you get an email with the quotation for the products selected, on successful run of the recipe.

- c. On the Sales person page, the sales person details appear. Click **Next**.

- d. On the Product page, choose the products and corresponding quantity for each product.

- e. Click **Submit**.

On submitting the interview in Oracle Intelligent Advisor, the **Oracle IA CPQ Save CPQ Transaction** integration flow is triggered. On successful execution of the integration flow, a new transaction corresponding to the submitted Oracle Intelligent Advisor interview is created in Oracle CPQ.

3. Monitor the running of the integration flow in Oracle Integration.

- a. In the project workspace, click **Observe**. You'll see the integration flow being triggered and running successfully.

- b. To manage errors in your project, see *Manage Errors in a Project*.

4. Log in to the Oracle CPQ instance and verify that a new transaction corresponding to the Oracle Intelligent Advisor interview is created.

Also, check if you received an email with the quotation for the new transaction.

### Related Documentation

- *Using the Oracle Intelligent Advisor Adapter with Oracle Integration 3*
- *Using the Oracle CPQ Adapter with Oracle Integration 3*