Oracle® Cloud

Using the Oracle CPQ Cloud Adapter with Oracle Integration
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Preface

This guide describes how to configure the Oracle CPQ Cloud Adapter as a connection in an integration in Oracle Integration.

Note:

The information in this guide applies to all of your Oracle Integration instances. It doesn’t matter which edition you’re using, what features you have, or who manages your cloud environment. You’ll find what you need here, including notes about any differences between the various flavors of Oracle Integration when necessary.

Topics

• Audience
• Documentation Accessibility
• Related Resources
• Conventions

Audience

This guide is intended for developers who want to use the Oracle CPQ Cloud Adapter in integrations in Oracle Integration.

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.

Related Resources

See these Oracle resources:
• Oracle Cloud
  http://cloud.oracle.com
• Using Integrations in Oracle Integration
• Using the Oracle Mapper with Oracle Integration

Conventions

The following text conventions are used in this document:

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>boldface</strong></td>
<td>Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.</td>
</tr>
<tr>
<td><em>italic</em></td>
<td>Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.</td>
</tr>
<tr>
<td><code>monospace</code></td>
<td>Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.</td>
</tr>
</tbody>
</table>
Understand the Oracle CPQ Cloud Adapter

Review the following conceptual topics to learn about the Oracle CPQ Cloud Adapter and how to use it as a connection in integrations in Oracle Integration. A typical workflow of adapter and integration tasks is also provided.

Topics:
- Oracle CPQ Cloud Adapter Capabilities
- What Application Version Is Supported?
- About Oracle CPQ Cloud Adapter Use Cases
- Workflow to Create and Add an Oracle CPQ Cloud Adapter Connection to an Integration

Oracle CPQ Cloud Adapter Capabilities

The Oracle Configure, Price, and Quote (CPQ) Cloud Adapter enables you to create an integration with an Oracle CPQ application.

The Oracle CPQ Cloud Adapter enables you to convert sales opportunities into revenue by automating the quoting and sales order process with guided selling, dynamic pricing, and a workflow approval process.

Oracle CPQ cloud extends sales automation to include the creation of an optimal quote, which enables sales personnel to configure and price complex products; select the best options, promotions, and deal terms; and include upsell and renewals, all using automated workflows.

The main use case for Oracle CPQ Cloud is as the trigger (source) in an integration in which Oracle Sales Cloud is the invoke (target). This adapter replicates the point-to-point integration that exists today between Oracle CPQ Cloud and Oracle Sales Cloud. Oracle CPQ Cloud is the trigger (source) of the record application. A synchronize process is triggered as you update and save data in Oracle CPQ Cloud, but it can also be configured by the administrator of the application. The Oracle CPQ Cloud Adapter can also be configured as the invoke (target) in an integration.

Prebuilt integration flows with Oracle CPQ Cloud and Oracle Sales Cloud for quote creation, opportunity import, and quote update are also provided from the Oracle Marketplace.

What Application Version Is Supported?

For information about which application version is supported by this adapter, see the Oracle Integration Adapters Certification Matrix under section Oracle Integration Adapters Certification at the top of the page:

Oracle Integration Adapters Certification Matrix
About Oracle CPQ Cloud Adapter Use Cases

The Oracle CPQ Cloud Adapter can be used as the invocation trigger (source) for quotes and the Oracle SOAP APIs can be used as the invoke (target). Another use case is an Oracle Sales Cloud integration that uses quote data to interact with an opportunity business object and its revenue items.

Video

Workflow to Create and Add an Oracle CPQ Cloud Adapter Connection to an Integration

You follow a very simple workflow to create a connection with an adapter and include the connection in an integration in Oracle Integration.

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<th>Description</th>
<th>More Information</th>
</tr>
</thead>
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<td>1</td>
<td>Create the adapter connections for the applications you want to integrate. The connections can be reused in multiple integrations and are typically created by the administrator.</td>
<td>Create an Oracle CPQ Cloud Adapter Connection</td>
</tr>
<tr>
<td>2</td>
<td>Create the integration. When you do this, you add trigger and invoke connections to the integration.</td>
<td>Create Integrations and Add the Oracle CPQ Cloud Adapter Connection to an Integration</td>
</tr>
<tr>
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<td>4</td>
<td>(Optional) Create lookups that map the different values used by those applications to identify the same type of object (such as gender codes or country codes).</td>
<td>Manage Lookups of Using Integrations in Oracle Integration</td>
</tr>
<tr>
<td>5</td>
<td>Activate the integration.</td>
<td>Manage Integrations of Using Integrations in Oracle Integration</td>
</tr>
<tr>
<td>6</td>
<td>Monitor the integration on the dashboard.</td>
<td>Monitor Integrations of Using Integrations in Oracle Integration</td>
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<tr>
<td>7</td>
<td>Track payload fields in messages during runtime.</td>
<td>Assign Business Identifiers for Tracking Fields in Messages and Manage Business Identifiers for Tracking Fields in Messages of Using Integrations in Oracle Integration</td>
</tr>
<tr>
<td>8</td>
<td>Manage errors at the integration level, connection level, or specific integration instance level.</td>
<td>Manage Errors of Using Integrations in Oracle Integration</td>
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Create an Oracle CPQ Cloud Adapter Connection

A connection is based on an adapter. You define connections to the specific cloud applications that you want to integrate.

Topics:
• Prerequisites for Creating a Connection
• Create a Connection
• Upload an SSL Certificate

Prerequisites for Creating a Connection

You must satisfy the following prerequisites to create a connection with the Oracle CPQ Cloud Adapter:

• Register with the Oracle CPQ Cloud site. You then receive an email with information that you use to create a connection on the Connections page. See Configure Connection Properties and Configure Connection Security.

• Obtain the SOAP WSDL from the Oracle CPQ Cloud site. Note the following details:
  – The WSDL must be generated by the Oracle CPQ Cloud site to integrate with Oracle Integration.
  – Web Services 2.0 must be used to generate the URL needed to generate the WSDL.
  – The Commerce SOAP server URL endpoint must be used to generate the URL needed to generate the WSDL.
  – The commerce process to integrate with Oracle Integration must be used to generate the URL needed to generate the WSDL.

Oracle Integration uses the Oracle CPQ Cloud transaction WSDL to understand the valid data and operations provided by Oracle CPQ Cloud.

To access the Oracle CPQ Cloud transaction WSDL:

1. Log in to the Oracle CPQ Cloud site that you want integrate with Oracle Integration.

2. To open the Admin home page, click Admin.
   The Admin home page appears.


4. For the Web Service Version, select 2.0.

5. Ensure that the Commerce tab is the current tab.
6. From the **Process Name** list, select the name of the commerce process to integrate with Oracle Integration.

7. In the **SOAP Server URL** field, append ?WSDL to the end of the value. For example: https://site_URL/v2_0/receiver/commerce/processVarName?WSDL.

   where:
   - site_URL is the base URL of the Oracle CPQ Cloud site.
   - processVarName is the variable name of the selected commerce process.
   - Optional: To confirm that the URL is correct, open it in a web browser. A page of WSDL should appear.

   Use the URL you created as needed in Oracle Integration to reference the Oracle CPQ Cloud transaction WSDL.

- Observe the REST catalog URL

  You specify a REST catalog URL to access an Oracle CPQ Cloud application’s business resources for outbound connections. The REST catalog URL is formatted as follows:

  http(s)://site_URL/rest/v3/metadata-catalog

  where site_URL is the base URL of the Oracle CPQ Cloud site.

  Note that:
  - Only a REST catalog with version 3 or above is supported.
  - You must be on Oracle CPQ Cloud release 2016R2 or above to use the REST catalog in the Oracle CPQ Cloud Adapter.

**Create a Connection**

The first step in creating an integration is to create the connections to the applications with which you want to share data.

1. In the navigation pane, click **Integrations**, then click **Connections**.
2. Click **Create**.

   **Note:**

   You can also create a connection in the integration canvas of:
   - An orchestrated integration (See Define Inbound Triggers and Outbound Invokes.)
   - A basic routing integration (See Add a Trigger (Source) Connection.)

The Create Connection — Select Adapter dialog is displayed.
3. Select an adapter from the dialog. You can also search for the type of adapter to use by entering a partial or full name in the Search field, and clicking Search. The Create New Connection dialog is displayed.

4. Enter the information to describe the connection.
   - Enter a meaningful name to help others find your connection when they begin to create their own integrations. The name you enter is automatically added in capital letters to the Identifier field. If you modify the identifier name, do not include a blank space (for example, Sales Opportunity).
   - Select the role (direction) in which to use this connection (trigger, invoke, or both). Only the roles supported by this adapter are displayed for selection. When you select a role, only the connection properties and security policies appropriate to that role are displayed on the Connections page. If you select an adapter that supports both invoke and trigger, but select only one of those roles, then try to drag the adapter into the section you did not select, you receive an error (for example, configure an Oracle Service Cloud (RightNow) Adapter as only an invoke, but drag the adapter to the trigger section).
   - Enter an optional description of the connection.

5. Click Create.

Your connection is created and you are now ready to configure connection details, such as email contact, connection properties, security policies, connection login credentials, and (for certain connections) agent group.

Add a Contact Email

From the Connection Administrator section of the connection, you can add a contact email address for notifications.
1. In the **Email Address** field, enter an email address to receive email notifications when problems occur.

2. In the upper right corner, click **Save**.

**Configure Connection Properties**

Enter connection information so your application can process requests.

1. Click **Configure Connectivity**.

   The Connection Properties dialog is displayed.

2. In the **Connection Type** field, select the URL type to use in this integration. This field is available for connections with the invoke role or trigger and invoke role.

   - **SOAP WSDL URL**
   - **REST Catalog URL**

3. In the **Connection URL** field, specify the URL to use in this integration. To obtain the URL, see Prerequisites for Creating a Connection.

4. Click **OK**.

5. Configure connection security.

**Configure Connection Security**

Configure security for your Oracle CPQ Cloud Adapter connection by selecting the security policy and login credentials.

1. Click **Configure Credentials**.

2. Enter your login credentials. The only requirement is that you must have API access in Oracle CPQ Cloud. Beyond that it does not matter which user is configured. To obtain the login credentials, see Prerequisites for Creating a Connection.

   a. Select the security policy. Only the Username Password Token policy is supported. It cannot be deselected.

   b. Enter the username and password to connect.

   c. Reenter the password a second time.

3. Click **OK**.

**Test the Connection**

Test your connection to ensure that it is successfully configured.

1. In the upper right corner of the page, click **Test**.
2. If your adapter connection uses a WSDL, you are prompted to select the type of connection testing to perform:

- **Validate and Test**: Performs a full validation of the WSDL, including processing of the imported schemas and WSDLs. Complete validation can take several minutes depending on the number of imported schemas and WSDLs. No requests are sent to the operations exposed in the WSDL.

- **Test**: Connects to the WSDL URL and performs a syntax check on the WSDL. No requests are sent to the operations exposed in the WSDL.

If successful, the following message is displayed and the progress indicator shows 100%.

Connection *connection_name* was tested successfully.

3. If your connection was unsuccessful, an error message is displayed with details. Verify that the configuration details you entered are correct.

4. When complete, click **Save**, then click **Close**.

### Upload an SSL Certificate

Certificates are used to validate outbound SSL connections. If you make an SSL connection in which the root certificate does not exist in Oracle Integration, an exception is thrown. In that case, you must upload the appropriate certificate. A certificate enables Oracle Integration to connect with external services. If the external endpoint requires a specific certificate, request the certificate and then upload it into Oracle Integration.

To upload an SSL certificate:

1. In the navigation pane, click **Integrations**, then click the < arrow next to **Designer**.

2. Click **Settings > Certificates**.

   All certificates currently uploaded to the trust store are displayed in the Certificates dialog. The **Filter By > Type** list displays the following details:

   - **Preinstalled**: Displays the certificates automatically installed in Oracle Integration. These certificates cannot be deleted.
   - **Uploaded**: Displays the certificates uploaded by individual users. These certificates can be deleted and updated.

   You can also search for certificates in the **Search** field. The search results are limited to a maximum of ten records sorted by name for performance and usability reasons. To ensure that your search results are more granular, enter as much of the certificate name as possible.

3. Click **Upload** at the top of the page.

4. In the Upload Certificate dialog box, select the certificate type. Each certificate type enables Oracle Integration to connect with external services.

   - **Trust Certificate**: Use this option to upload a trust certificate.
     a. Enter a unique alias for the certificate.
     b. Click **Browse**, then select the trust file (for example, `.cer` or `.crt`) to upload.

   - **Message Protection Certificate**: Use this option to upload a keystore certificate with SAML token support. Create, read, update, and delete (CRUD) operations are supported on this type of certificate.
a. Enter a unique alias for the certificate.
b. Click Browse, then select the certificate file (.cer or .crt) to upload.

- **Identity Certificate**: Use this option to upload a certificate for two-way SSL communication.
a. Click Browse, then select the keystore file (.jks) to upload.
b. Enter the password of the keystore being imported.
c. Enter the comma-separated list of aliases from the keystore being imported.
d. Enter the comma-separated list of passwords corresponding to key aliases.
e. If you want to display the passwords in clear text, select Show Key Password(s). This enables you to ensure that you are correctly entering a list of keystore passwords.

5. Click Upload.

6. Click the certificate name to view details such as the subject of the certificate, the issuer of the certificate, the date the certificate was issued, and the date the certificate expires.
Add the Oracle CPQ Cloud Adapter Connection to an Integration

When you drag the Oracle CPQ Cloud Adapter into the trigger or invoke area of an integration, the Adapter Endpoint Configuration Wizard appears. This wizard guides you through the configuration of the Oracle CPQ Cloud Adapter endpoint properties.

These topics describe the wizard pages that guide you through configuration of the Oracle CPQ Cloud Adapter as a trigger or invoke in an integration.

Topics:
- Basic Info Page
- Trigger Request Page
- Trigger Response Page
- Invoke Operation Page
- Summary Page

### Basic Info Page

You can enter a name and description on the Basic Info page of each adapter in your integration.

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>What do you want to call your endpoint?</td>
<td>Provide a meaningful name so that others can understand the responsibilities of this connection. You can include English alphabetic characters, numbers, underscores, and dashes in the name. You cannot include the following:</td>
</tr>
<tr>
<td></td>
<td>• Blank spaces (for example, My Inbound Connection)</td>
</tr>
<tr>
<td></td>
<td>• Special characters (for example, #;83 or righ(t)now4)</td>
</tr>
<tr>
<td></td>
<td>• Multibyte characters</td>
</tr>
<tr>
<td>What does this endpoint do?</td>
<td>Enter an optional description of the connection's responsibilities. For example: This connection receives an inbound request to synchronize account information with the cloud application.</td>
</tr>
</tbody>
</table>

### Trigger Request Page

View the Oracle CPQ Cloud trigger request values for your integration.
You can view the Transaction business object to receive from the Oracle CPQ application as a request document to start the integration flow.

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Business Object</strong></td>
<td>View the transaction business object. This object is from the CPQ commerce process. This is the business object that you receive from the Oracle CPQ application as a request document to start this integration flow. This business object is automatically selected based on the content of the WSDL file you specified when creating the Oracle CPQ connection.</td>
</tr>
</tbody>
</table>

**Trigger Response Page**

View the Oracle CPQ Cloud trigger response values for your integration.

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send a Response</td>
<td>Indicates that a response business object is sent from the integration flow to the Oracle CPQ application. This option is automatically configured and cannot be changed.</td>
</tr>
<tr>
<td>Response Type</td>
<td>Indicates that the business object is sent back synchronously to the source application. This option is automatically configured and cannot be changed.</td>
</tr>
<tr>
<td>Business Object</td>
<td>Displays the Transaction business object. This object is from a CPQ Commerce process. This business object is automatically selected based on the content of the WSDL file you specified when creating the Oracle CPQ connection.</td>
</tr>
</tbody>
</table>

**Invoke Operation Page**

View and configure the Oracle CPQ Cloud invoke operation values for your integration.

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPQ API Version 2</td>
<td>Displays Commerce.</td>
</tr>
<tr>
<td>Element</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Select an Operation</td>
<td>Select an operation. These operations come from the WSDL you specified when creating the connection.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Add a Transaction</strong>: Adds a new item to an existing transaction performing the Add from Catalog action. The input parameters include the process, the document, the action on the document, and the items to be added.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Create Transaction</strong>: Supports the creation of a commerce Transaction without line items and transactions with nonconfigurable line items from a specified process. For all transactions required to be created with configurable line items, the Configuration SOAP API must be invoked. This action returns the transaction ID.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Export File Attachments</strong>: Exports a file attachment using one of two methods to stream the data through SOAP:</td>
</tr>
<tr>
<td></td>
<td>– Inline base64 content in a SOAP message</td>
</tr>
<tr>
<td></td>
<td>– Binary stream with MIME containers through an MTOM transmission</td>
</tr>
<tr>
<td></td>
<td>These methods read and write multiple attributes at once per transaction. This API can only be used by full-access users with the Modify Users permission. There are two modes available for use:</td>
</tr>
<tr>
<td></td>
<td>– Content: Retrieves the content of the attached fields.</td>
</tr>
<tr>
<td></td>
<td>– Metadata: Retrieves the file information or metadata for the referenced fields.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Get Transaction</strong>: Returns the complete Transaction XML content for the given Transaction ID.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Import File Attachments</strong>: Imports a file attachment using one of two methods to stream the data through SOAP:</td>
</tr>
<tr>
<td></td>
<td>– Inline base64 content in a SOAP message</td>
</tr>
<tr>
<td></td>
<td>– Binary stream with MIME containers through an MTOM transmission</td>
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<tr>
<td></td>
<td>These methods read and write multiple attributes at once per transaction. This API can only be used by full-access users with the Modify Users permission. There are two modes available for use:</td>
</tr>
<tr>
<td></td>
<td>– Update: Attaches a file or set of files to the transaction</td>
</tr>
<tr>
<td></td>
<td>– Delete: Removes a file from the file attachment attribute</td>
</tr>
<tr>
<td></td>
<td>• <strong>Remove from Transaction</strong>: Removes an item from an existing transaction by performing the Remove Line Items action. The input parameters include the document ID, document number, process name, and document name.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Update Transaction</strong>: Updates an existing transaction by performing the Modify and Auto-fill actions. The Create Document action is not supported.</td>
</tr>
<tr>
<td>Business Objects</td>
<td>Displays the Transaction business object.</td>
</tr>
</tbody>
</table>
You can review the specified adapter configuration values on the Summary page.

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
</table>
| Summary | Displays a summary of the configuration values you defined on previous pages of the wizard.  
The information that is displayed can vary by adapter. For some adapters, the selected business objects and operation name are displayed. For adapters for which a generated XSD file is provided, click the XSD link to view a read-only version of the file.  
To return to a previous page to update any values, click the appropriate tab in the left panel or click Back. Click Cancel to cancel your configuration details. |
Troubleshoot the Oracle CPQ Cloud Adapter

The following topic can help you troubleshoot problems you may encounter with the Oracle CPQ Cloud Adapter.

Topics:

• Configuration Error When Using the Oracle CPQ Cloud Adapter as a Trigger Connection with a REST Catalog URL
• Updating the WSDL Definitions of Data Tables

Additional integration troubleshooting information is provided. See Troubleshoot Oracle Integration in Using Integrations in Oracle Integration.

Configuration Error When Using the Oracle CPQ Cloud Adapter as a Trigger Connection with a REST Catalog URL

If you create and successfully test an Oracle CPQ Cloud Adapter connection, but receive the following error when adding the connection as a trigger in the integration canvas, ensure that you specified a SOAP WSDL URL on the Connections page. When used as a trigger connection, the Oracle CPQ Cloud Adapter requires the use of a SOAP WSDL URL and does not work with a REST catalog URL.

Root cause of the Exception: Inbound is not supported

Updating the WSDL Definitions of Data Tables

When Oracle Integration calls Oracle CPQ Cloud with the Oracle CPQ Cloud Adapter, you can receive the following error:

Fault Code: ns1:FailedAuthentication
Fault String: The security token could not be authenticated or authorized

If you receive this error, update the WSDL definitions of the data tables (for example, after a site refresh).

1. From the Administration Platform page of the Oracle CPQ Cloud application, go to the Web Services (Test) page.
2. Click Generate Schema and WSDL.
3. Read the line Data Tables: Generated when table definition is updated.
4. Open the Oracle CPQ Cloud > Data Tables page.
5. Locate the data table in the navigation pane (filter for the data table, if necessary).

6. Right-click the data table.

7. Select **Deploy**.

8. Check the WSDL again.

Additional integration troubleshooting information is provided. See Oracle Integration in *Using Integrations in Oracle Integration*. 