Cisco Prof Services Automation POC

# Engagement

Cisco Professional Services Automation - End to end quote to cash solution for quoting, resourcing, planning, and delivering a consulting and installation project. CPQ, Projects, EBS, Field Service Cloud

## Request Details

Opportunity: 95M7J

ECA: Steve Liao

SCRM Engagement: [10510972](https://apex-fusioncrm.oraclecorp.com/apex/f?p=362:2:::::P2_ENG_ID:10510972)

# Environments

## CPQ

Instance Name: cpq-10128

CPQ App Login: <https://cpq-10128.bigmachines.com/commerce/display_company_profile.jsp>

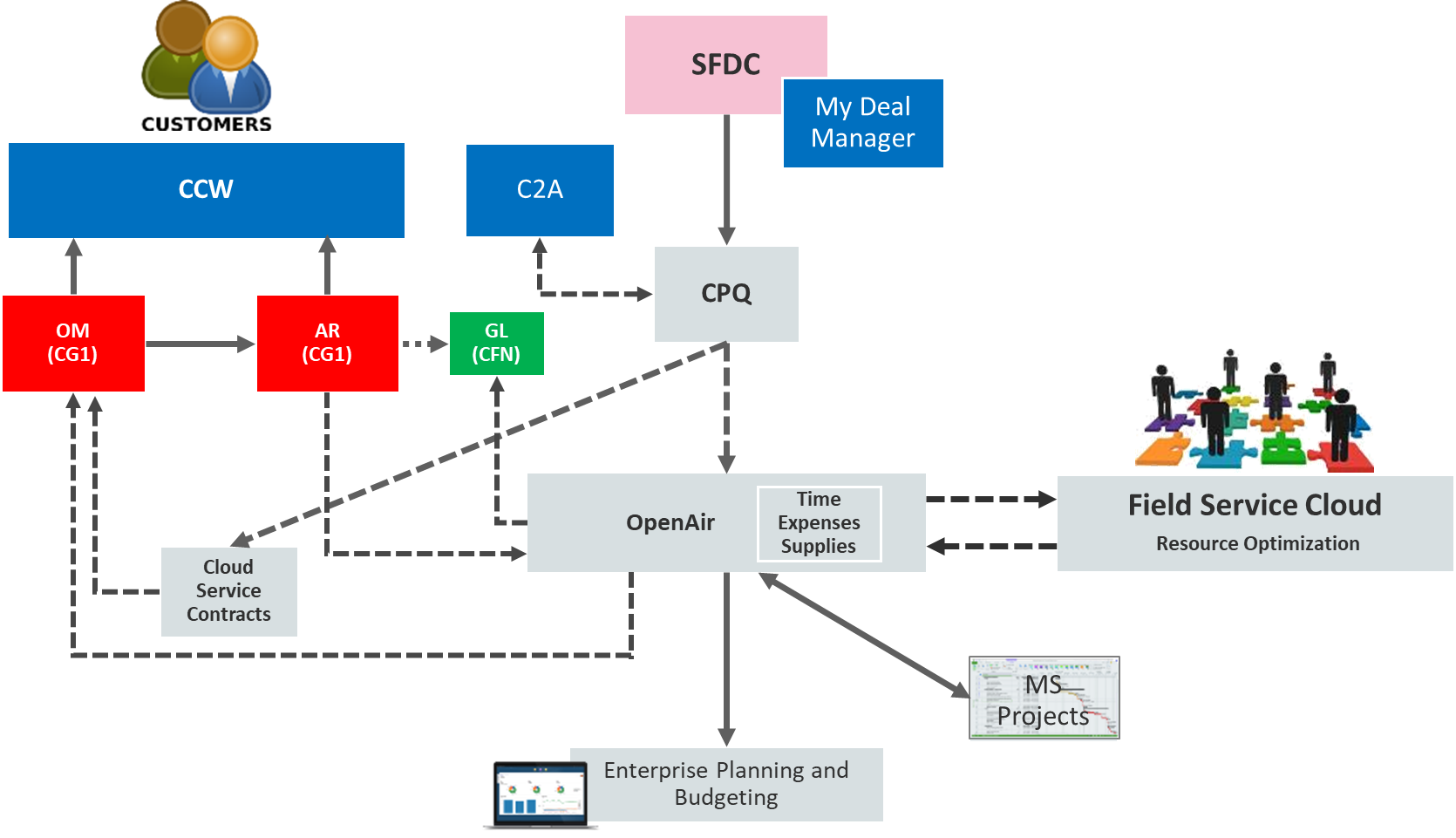
Username: Admin

Password: hIdeOuS@0PROOf

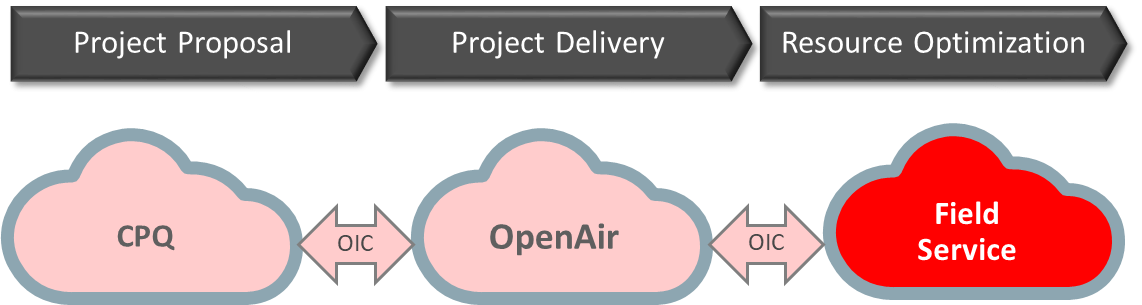
Process Variable Name: oraclecpqo

# Use Case

## Solution Architecture



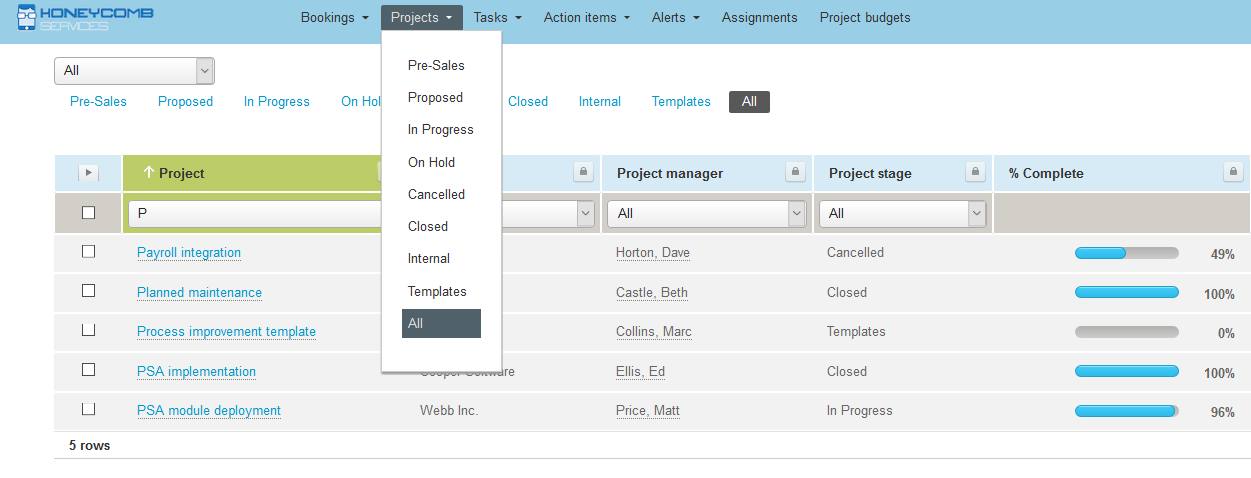
## Integration Flow



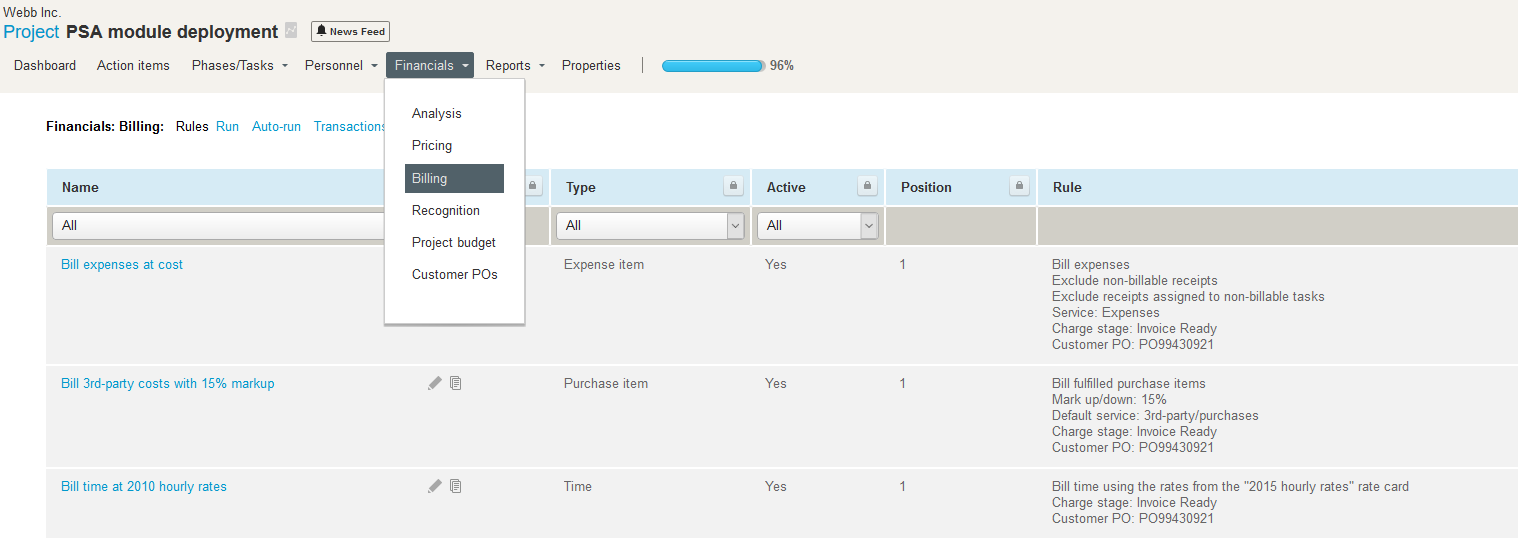
# Implementation: NSOA - CPQ

## NetSuite OpenAir

### Projects



### Project Billing Lines



## Mapping CPQ Transactions to NS OpenAir Projects

### CPQ Transaction > NSOA Project

|  |  |  |  |
| --- | --- | --- | --- |
| Fields | CPQ Attributes | NS OpenAir Attributes | Assigned |
| Project ID | projectID | id | <auto> |
| Opportunity / Project | opportunityName\_t | name | <map> |
| Company Name | \_customer\_t\_company\_name | customer\_name | “AT&T Technologies” |
| Customer ID | - | customerid | “5” |
| Template | projectTemplate | template\_project\_id | “76” - Workplan Activation v1 |
| Project stage | sfaStage\_t (?) | project\_stageid | “2” |
| Currency | currencyCode | currency | <map> |
| Cost center | - | cost\_centerid | “1” |
| CPQ Project ID | transactionID\_t | cpqprojectid\_\_c | <map> |
| Start Date | sfaCloseDate\_t | start\_date | <auto> |
|  |  |  |  |

### CPQ Transaction Lines > NSOA Project Billing Rules

|  |  |  |  |
| --- | --- | --- | --- |
| Fields | CPQ Attributes | NS OpenAir Attributes | Assigned |
| Project Billing Rule ID | - | id | <auto> |
| Parent ID |  | projectid | <map> |
| Amount | contractValue\_l.value | amount | <map> |
| Type | priceType\_l | type | T - time billing rule  E - expense billing rule  **F - fixed fee billing rule**  P – purchase billing rule |
| Description | \_part\_desc | name | <map> |
| Service | - | categoryid | “3” - Integration |
| Opportunity Stage | Opportunity Stage | slip\_stageid | “1” – Invoice Ready |
| Start date | - | start\_date | <auto> |
| Charge descirption: concat 2 fields from CQP Transaction Line | \_part\_number | description | <map> |
| Customer PO |  |  |  |
| Employee |  |  |  |
|  |  |  |  |

# OIC Integration

## Connections

### CPQ Adapter Connection

Name: CPQ-10128\_Conn

Role: Trigger and Invoke

**Connection Properties**

Connection Type: SOAP WSDL URL

Connection URL: https://cpq-10128.bigmachines.com/v2\_0/receiver/commerce/oraclecpqo?wsdl

**Security**

Security Policy: Username Password Token

Username: Admin

Password: <weekly>

## OIC Integrations

### RC\_CPQ-NSOpenAirREST\_QuoteToProject

Type: Application even or Business object

Identifier: RC\_CPQ\_NSOPENAIR\_1

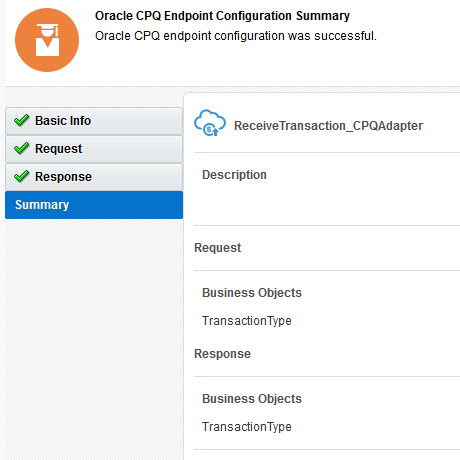
Description: Invoke a CPQ adapter endpoint with a request to add a new OpenAir Project

**Trigger CPQ Adapter Connection**

Endpoint name: ReceiveTransaction\_CPQAdapter

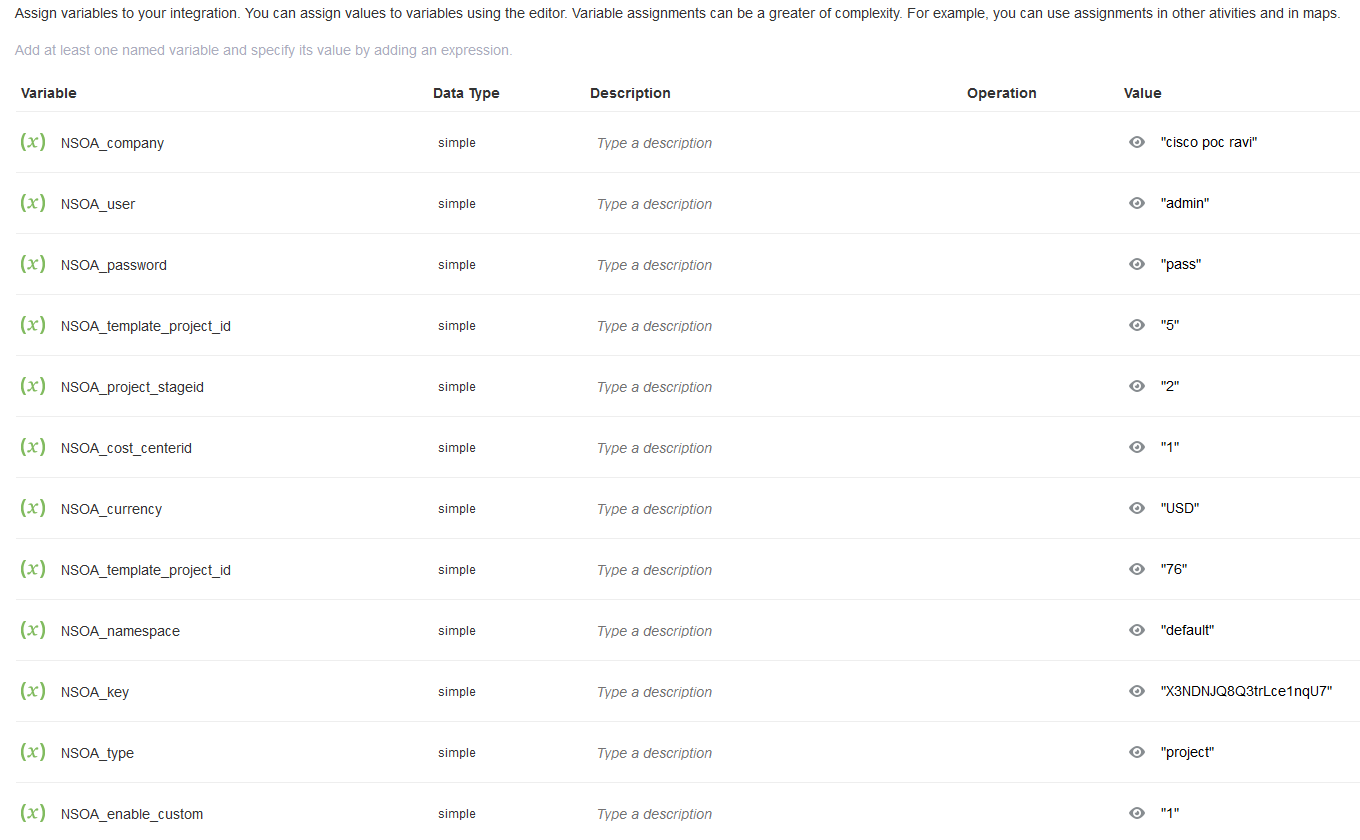
Business Object: Transaction

Summary



**Invoke Assign**

Name: NSOA



**Invoke REST Connector**

Connector: NSOpenAir\_RESTConn

Name: AddProject\_REST

REST Service URI: /api.pl

Action: POST

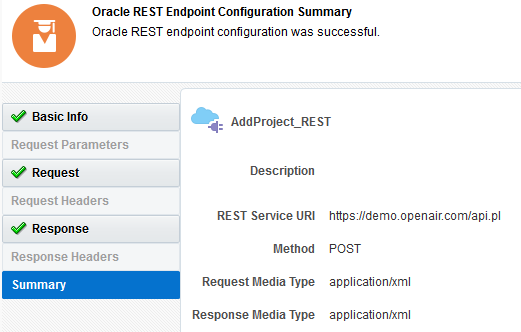
Configure a request payload for this endpoint: Enabled

Configure this endpoint to receive the response: Enabled

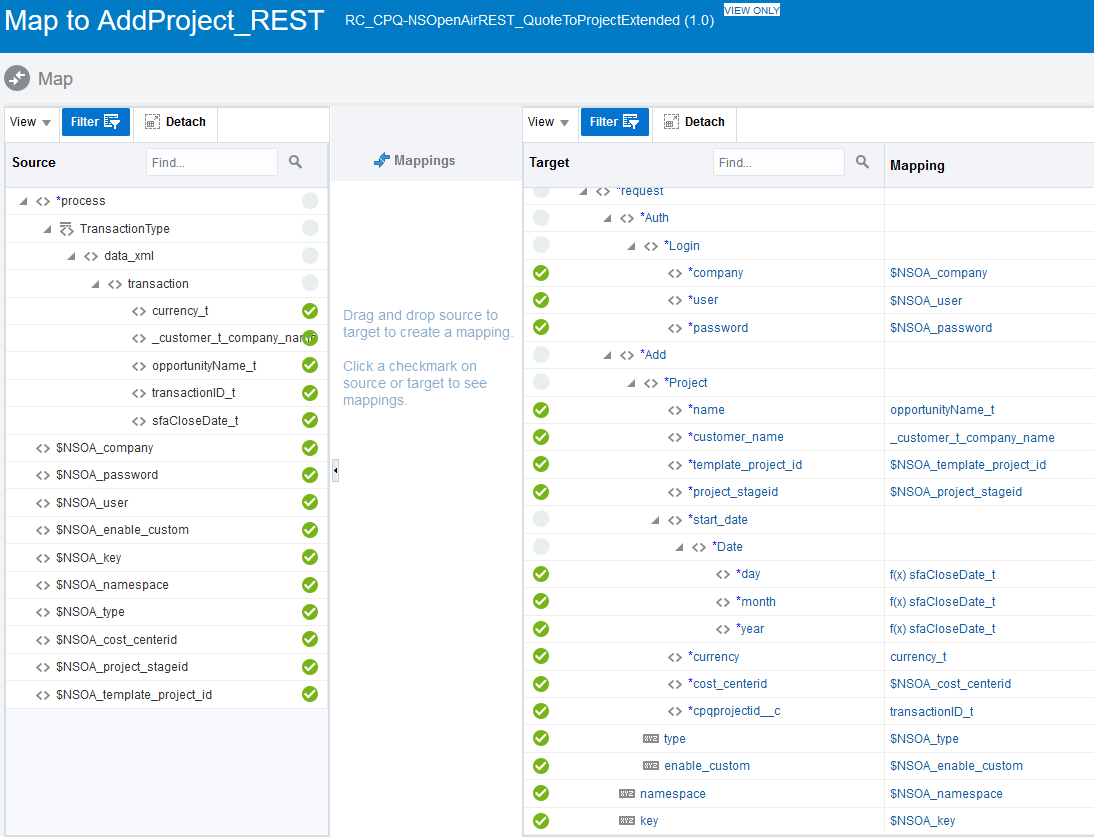
Request payload format: XML Schema [File: AddProject\_Request.xsd]

Response payload format: XML Schema [File: AddProject\_Response.xsd]

Summary



**Map**



**Endpoint URL**

https://icsinstance-gse00011402.integration.us2.oraclecloud.com/integration/flowapi/rest/RC\_OSC\_CREATECONTACT/v01/contact

### RC\_CPQ-NSOpenAirREST\_QuoteToProjectExtended

Type: Application even or Business object

Identifier: RC\_CPQ\_NSOPENAIR\_2

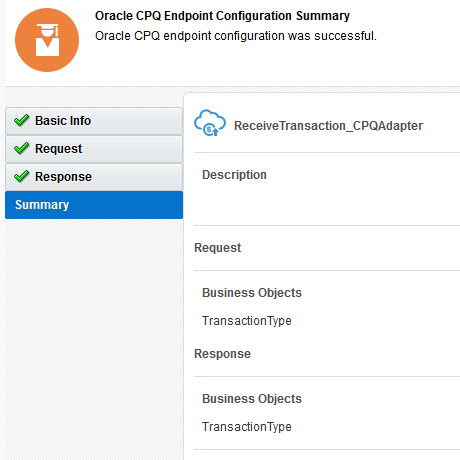
Description: Invoke a CPQ adapter endpoint with a request to add a new OpenAir Project and Project Billing Rules

#### Trigger CPQ Adapter Connection

Endpoint name: ReceiveTransaction\_CPQAdapter

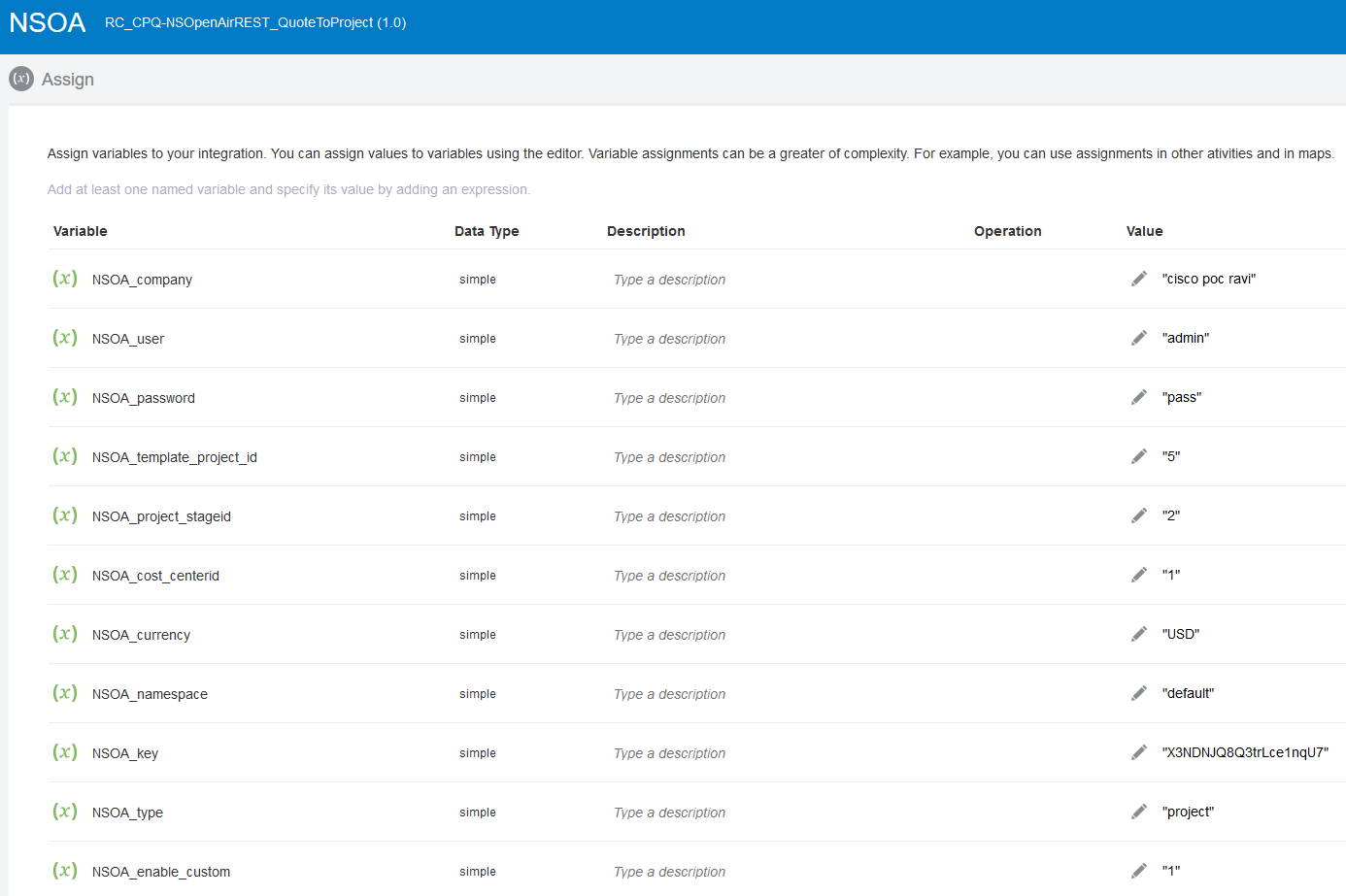
Business Object: Transaction

**Summary**



#### Invoke Assign

Name: NSOA



**Invoke REST Connector**

Connector: NSOpenAir\_RESTConn

Name: AddProject\_REST

REST Service URI: /api.pl

Action: POST

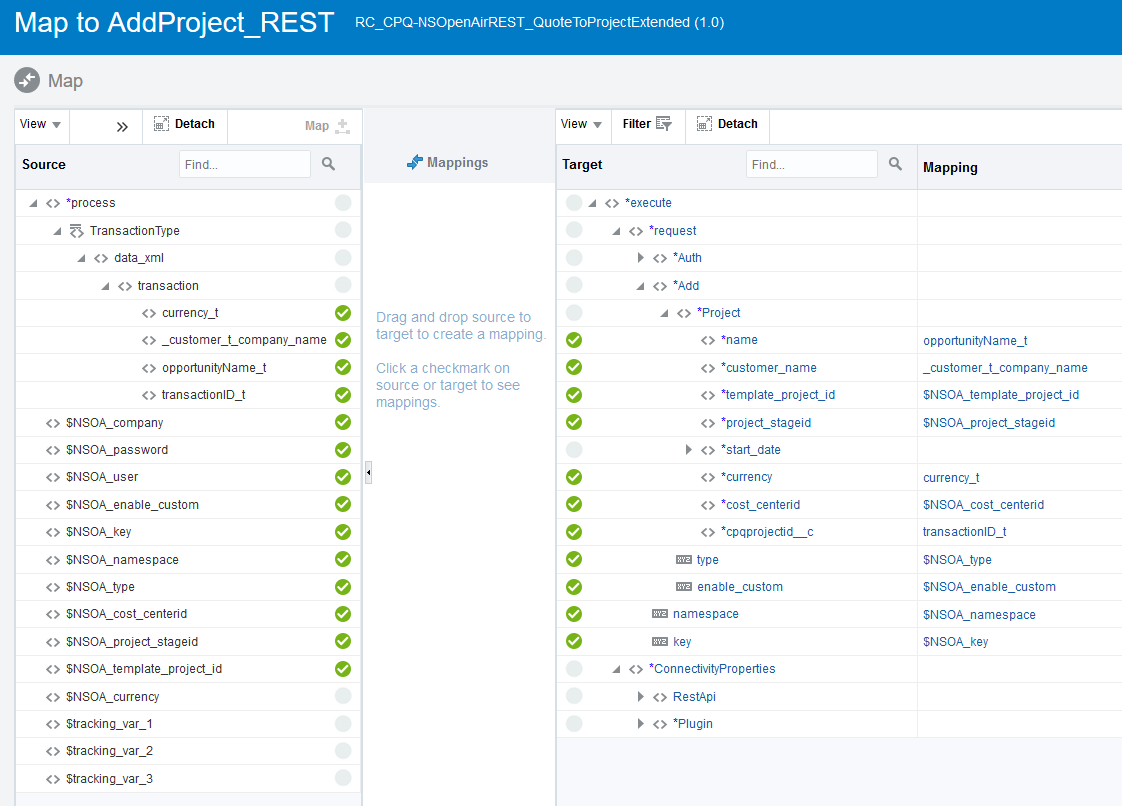
Configure a request payload for this endpoint: Enabled

Configure this endpoint to receive the response: Enabled

Request payload format: XML Schema [File: AddProject\_Request.xsd]

Response payload format: XML Schema [File: AddProject\_Response.xsd]

#### Map



#### For Each Loop

#### Invoke REST Connector

Connector: NSOpenAir\_RESTConn

Name: AddProjectbillingrule\_REST

REST Service URI: /api.pl

Action: POST

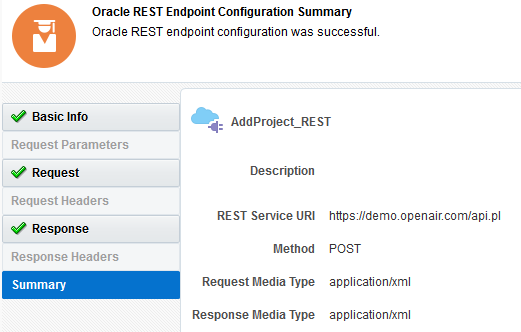
Configure a request payload for this endpoint: Enabled

Configure this endpoint to receive the response: Enabled

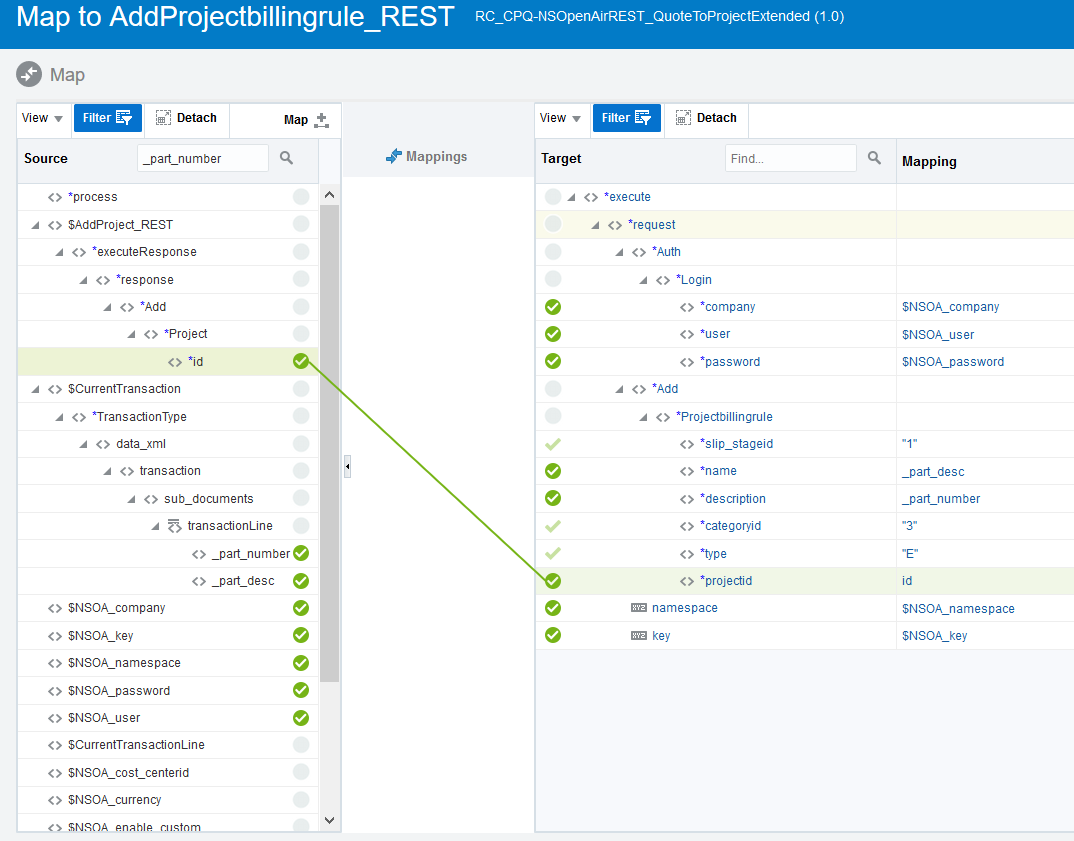
Request payload format: XML Schema [File: AddProjectbillingrule\_Request.xsd]

Response payload format: XML Schema [File: AddProjectbillingrule\_Response.xsd]

Summary



#### Map

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# Postman REST Requests

## CPQ

### Get Transaction

**Action**: GET

**URL**: <https://cpq-10128.bigmachines.com/rest/v5/commerceDocumentsOraclecpqoTransaction/37764889>

**Authorization**: Basic

**Response**

{

"paymentTerms\_t": {

"value": "Net 30",

"displayValue": "Net 30"

},

"shippingInformation\_header\_t": null,

"year5NPVCost\_t": {

"value": 7581,

"currency": "USD"

},

"totalOneTimeNetAmount\_t": {

"value": 22267,

"currency": "USD"

},

"googleMap": "<img src='http://maps.google.com/maps/api/staticmap?size=400x300&markers=color%3Ared|label%3AA|Atlanta%2CGeorgia&markers=color%3Ablue|label%3AB|Toronto%2COntario&sensor=false' alt = '' />",

"sOWOptions\_header\_t": null,

"currentStepForTesting\_tempDisplay\_t": "closedFulfilled",

"totalMonthlyDiscount\_t": {

"value": 0,

"currency": "USD"

},

"year1\_t": null,

"linkToDocument\_t": "https://cpq-10128.bigmachines.com/commerce/buyside/document.jsp?formaction=performAction&document\_id=36244074&action\_id=36244076&version\_id=36302652&id=37764889",

"includeDataSheets\_t": true,

"projectID": " <a href='https://ucf6-fap1935-fa-ext.oracledemos.com/fscmUI' target='\_blank'>PCS10065</a>",

"orderPlacedBy\_t": "Lisa Jones",

"year3\_t": null,

"advancedPayment\_quote": {

"value": 0,

"currency": "USD"

},

"year2\_t": null,

"totalOtherMargin": 0,

"customGroup1Name\_t": null,

"documentOptions\_header\_t": null,

"status\_t": {

"value": "QUOTED",

"displayValue": "Quoted"

},

"testOrder": null,

"miscChargeDiscount2\_t": null,

"year2NominalPL\_t": {

"value": 14686,

"currency": "USD"

},

"customGroup2DiscRecurring\_t": null,

"serviceVolumeFileImportURL\_sv\_t": null,

"nominalCost\_t": {

"value": 7581,

"currency": "USD"

},

"miscChargeDiscount3\_t": null,

"customGroup1DiscRecurring\_t": null,

"opportunityName\_t": "Wireless and SAN Opty",

"partyId": null,

"termsAndDetails\_header\_t": null,

"customGroup4Label\_t": null,

"includeCoverPage\_t": true,

"includeLineItemPrices\_t": true,

"bottomLineDiscountPercent\_quote": 0,

"totalAnnualValue\_t": {

"value": 0,

"currency": "USD"

},

"totalServicesCost\_t": {

"value": 899,

"currency": "USD"

},

"miscChargeGroup3\_t": null,

"miscCateogry5\_t": {

"value": "None",

"displayValue": "None"

},

"miscCharge6\_t": {

"value": 0,

"currency": "USD"

},

"\_id": 37764889,

"firstYearTotals\_header\_t": null,

"asyncResponse": null,

"excellentDeal\_t": "<p align='center' style='text-align:center; font-weight:bold; color:#333333; padding-bottom:20px;'>Deal Quality</p><img src='/bmfsweb/cpq-10128/image/Vision/excellent\_deal.png' />",

"year5NominalPL\_t": {

"value": 14686,

"currency": "USD"

},

"year1NominalCost\_t": {

"value": 7581,

"currency": "USD"

},

"\_invoiceTo\_t\_company\_name": "AT&T Technologies",

"billingAccountMapping": "null",

"opportunityIndustry": "Automotive",

"subtotalPostQuoteDiscounts\_quote": {

"value": 100705,

"currency": "USD"

},

"dealStatus\_q": {

"value": "Won",

"displayValue": "Won"

},

"miscChargeDiscountType3\_t": {

"value": "%",

"displayValue": "%"

},

"lineItemInformation\_header\_info": null,

"otherMargin": {

"value": 0,

"currency": "USD"

},

"customGroup5Subtotal\_t": {

"value": 0,

"currency": "USD"

},

"customGroup1Discount\_t": null,

"customGroup5Label\_t": null,

"group4Check\_t": false,

"miscChargeDiscountType2\_t": {

"value": "%",

"displayValue": "%"

},

"version\_t": 1,

"customGroup4DiscRecurring\_t": null,

"customGroup5SubtotalRecurring\_t": {

"value": 0,

"currency": "USD"

},

"accountNumber": null,

"year3NominalCost\_t": {

"value": 7581,

"currency": "USD"

},

"oSCOwnerResourcePartyId\_t": null,

"iBMLocation": null,

"defaultRequestDate\_t": "2018-04-04",

"nPVReturn\_t": 193.72,

"thirdYearFlag": false,

"projectCost\_t": {

"value": 0,

"currency": "USD"

},

"totalOneTimeDiscount\_t": {

"value": 0,

"currency": "USD"

},

"partnerLevel\_t": null,

"invoiceToAddressComplete\_t": true,

"year5NominalReturn\_t": 193.72,

"totalMiscNetPrice\_t": {

"value": 0,

"currency": "USD"

},

"ungroupedSubtotalRecurring\_t": {

"value": 6544,

"currency": "USD"

},

"bottomLineDiscount\_quote": 0,

"ungroupedSubtotal\_t": {

"value": 22177,

"currency": "USD"

},

"targetInstallationDate\_t": null,

"sendOrderTo\_t": {

"value": "sCMCloud",

"displayValue": "SCM Cloud"

},

"payment\_quote": {

"value": 0,

"currency": "USD"

},

"oRCL\_DM\_PriceComparisonStartDate\_t": "2017-04-04",

"year2NPVReturn\_t": 193.72,

"marginPctJSChart": "<p style='text-align:center; width:270px; font-weight:bold; color:#333333;'>Margin % Distribution</p><canvas id='marginPctDistributionSubs' width='270' height='200'></canvas>",

"softwareMargin\_t": {

"value": 10444,

"currency": "USD"

},

"year4NominalRevenue\_t": {

"value": 22267,

"currency": "USD"

},

"miscChargeList4\_t": {

"value": 0,

"currency": "USD"

},

"n5000": 2,

"miscOptional4\_t": false,

"miscOptional3\_t": false,

"miscChargeGroup2\_t": null,

"costAnnual\_quote": {

"value": 30885,

"currency": "USD"

},

"creditApproval": null,

"transactionInfo\_header\_t": null,

"servicesRevenue": {

"value": 37752,

"currency": "USD"

},

"totalOneTimeListAmount\_t": {

"value": 22267,

"currency": "USD"

},

"partUploadCsv\_t": {

"fileName": null,

"fileType": null,

"fileID": null,

"isFileSaved": false,

"fileLocation": "https://cpq-10128.bigmachines.com/rest/v5/commerceProcesses/oraclecpqo/documents/36244074/attachmentAttributes/partUploadCsv\_t/transactions/37764889/documentNumbers/1"

},

"miscChargeGroup4\_t": null,

"miscCateogry4\_t": {

"value": "None",

"displayValue": "None"

},

"userType\_t": "SalesAgent",

"miscOptional1\_t": false,

"miscCateogry6\_t": {

"value": "None",

"displayValue": "None"

},

"\_customer\_t\_fax": null,

"\_customer\_t\_phone": "(414) 213-1113",

"softwareMarginPercent\_t": 62.28,

"miscOptional2\_t": false,

"group1Check\_t": true,

"\_invoiceTo\_t\_first\_name": "Adam",

"totalMiscDiscount\_t": {

"value": 0,

"currency": "USD"

},

"lastUpdatedDate\_t": "2018-04-04T18:32:00Z",

"commissionHardware\_quote": 8,

"customGroup6Discount\_t": null,

"monthlyGroup\_t": null,

"year2NominalReturn\_t": 193.72,

"customGroup2Desc\_t": null,

"miscChargeQty3\_t": 1,

"totalMarginDollar\_quote": {

"value": 19198,

"currency": "USD"

},

"statusOSC\_t": "ZCA\_IN\_PROGRESS",

"oRCL\_DM\_ComparisonSet\_t": null,

"miscChargeGroup6\_t": null,

"\_last\_document\_number": 26,

"softwareTotal\_quote": {

"value": 16770,

"currency": "USD"

},

"bs\_id": "37764889",

"tierLevel": 11,

"listPriceAnnual\_quote": {

"value": 22267,

"currency": "USD"

},

"goodDeal\_t": "<p align='center' style='text-align:center; font-weight:bold; color:#333333; padding-bottom:20px;'>Deal Quality</p><img src='/bmfsweb/cpq-10128/image/Vision/good\_deal.png' />",

"customGroup1SubtotalRecurring\_t": {

"value": 6544,

"currency": "USD"

},

"\_customer\_t\_address": "123 Technology Way",

"year3NPVRevenue\_t": {

"value": 22267,

"currency": "USD"

},

"authorizationNumber\_l": null,

"originalServicesTotal\_quote": {

"value": 37752,

"currency": "USD"

},

"totalCostRecurring\_quote": {

"value": 1942,

"currency": "USD"

},

"transactionName\_t": "04/04/2018 - Wireless and SAN Opty",

"commissionHardwareval\_quote": {

"value": 1871.6,

"currency": "USD"

},

"proposal\_showDiscount\_t": true,

"parent\_transaction\_id\_versionTransaction\_t": null,

"commissionServicesval\_quote": {

"value": 3775.2,

"currency": "USD"

},

"miscChargeProd4\_t": null,

"outputDocumentLanguage": {

"value": "en",

"displayValue": "English"

},

"dealNegotiationHowThisTransactionComparesToOtherDe": null,

"totalCost\_quote": {

"value": 7581,

"currency": "USD"

},

"group6Check\_t": false,

"poorDeal\_t": "<p align='center' style='text-align:center; font-weight:bold; color:#333333; padding-bottom:20px;'>Deal Quality</p><img src='/bmfsweb/cpq-10128/image/Vision/poor\_deal.png' />",

"miscChargeProd3\_t": null,

"commissionSoftwareval\_quote": {

"value": 1257.75,

"currency": "USD"

},

"\_process\_var\_name": "oraclecpqo",

"revision2": {

"fileName": null,

"fileType": null,

"fileID": null,

"isFileSaved": false,

"fileLocation": "https://cpq-10128.bigmachines.com/rest/v5/commerceProcesses/oraclecpqo/documents/36244074/attachmentAttributes/revision2/transactions/37764889/documentNumbers/1"

},

"miscChargeProd5\_t": null,

"revision1": {

"fileName": null,

"fileType": null,

"fileID": null,

"isFileSaved": false,

"fileLocation": "https://cpq-10128.bigmachines.com/rest/v5/commerceProcesses/oraclecpqo/documents/36244074/attachmentAttributes/revision1/transactions/37764889/documentNumbers/1"

},

"annualNetPrice\_quote": {

"value": 22267,

"currency": "USD"

},

"revision4": {

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"fileType": null,

"fileID": null,

"isFileSaved": false,

"fileLocation": "https://cpq-10128.bigmachines.com/rest/v5/commerceProcesses/oraclecpqo/documents/36244074/attachmentAttributes/revision4/transactions/37764889/documentNumbers/1"

},

"orderDate\_t": "2018-04-04T18:42:00Z",

"userKey\_t": "CPQ-37764889v1",

"revision3": {

"fileName": null,

"fileType": null,

"fileID": null,

"isFileSaved": false,

"fileLocation": "https://cpq-10128.bigmachines.com/rest/v5/commerceProcesses/oraclecpqo/documents/36244074/attachmentAttributes/revision3/transactions/37764889/documentNumbers/1"

},

"revision5": {

"fileName": null,

"fileType": null,

"fileID": null,

"isFileSaved": false,

"fileLocation": "https://cpq-10128.bigmachines.com/rest/v5/commerceProcesses/oraclecpqo/documents/36244074/attachmentAttributes/revision5/transactions/37764889/documentNumbers/1"

},

"financingOptions\_quote": {

"value": "First Financials",

"displayValue": "First Financials"

},

"miscChargeProd6\_t": null,

"oRCL\_DM\_MinimumPriceDataPoints\_t": 10,

"miscChargeGroup5\_t": null,

"showColumns\_t": {

"items": [

{

"value": "discount",

"displayValue": "Discount"

},

{

"value": "eNTSP",

"displayValue": "ENT/SP"

}

]

},

"monthlyAdHocTotals\_t": null,

"year1NPVReturn\_t": 193.72,

"projectDuratio\_t": null,

"miscChargeList1\_t": {

"value": 0,

"currency": "USD"

},

"year3NPVReturn\_t": 193.72,

"year5NPVReturn\_t": 193.72,

"demoImage": {

"fileName": null,

"fileType": null,

"fileID": null,

"isFileSaved": false,

"fileLocation": "https://cpq-10128.bigmachines.com/rest/v5/commerceProcesses/oraclecpqo/documents/36244074/attachmentAttributes/demoImage/transactions/37764889/documentNumbers/1"

},

"approval\_revision\_submit\_t": 1,

"soapResponse": null,

"miscChargeList3\_t": {

"value": 0,

"currency": "USD"

},

"hardwareTotal\_quote": {

"value": 23395,

"currency": "USD"

},

"pricingFinalized\_t": true,

"statusPartial\_t": false,

"contractTotalDelta\_t": {

"value": 5407,

"currency": "USD"

},

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"fileType": null,

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"currentTime": "2018-04-04 13:32:30",

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"currency": "USD"

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"year4NPVCost\_t": {

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"preparedForAddressComplete\_t": true,

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