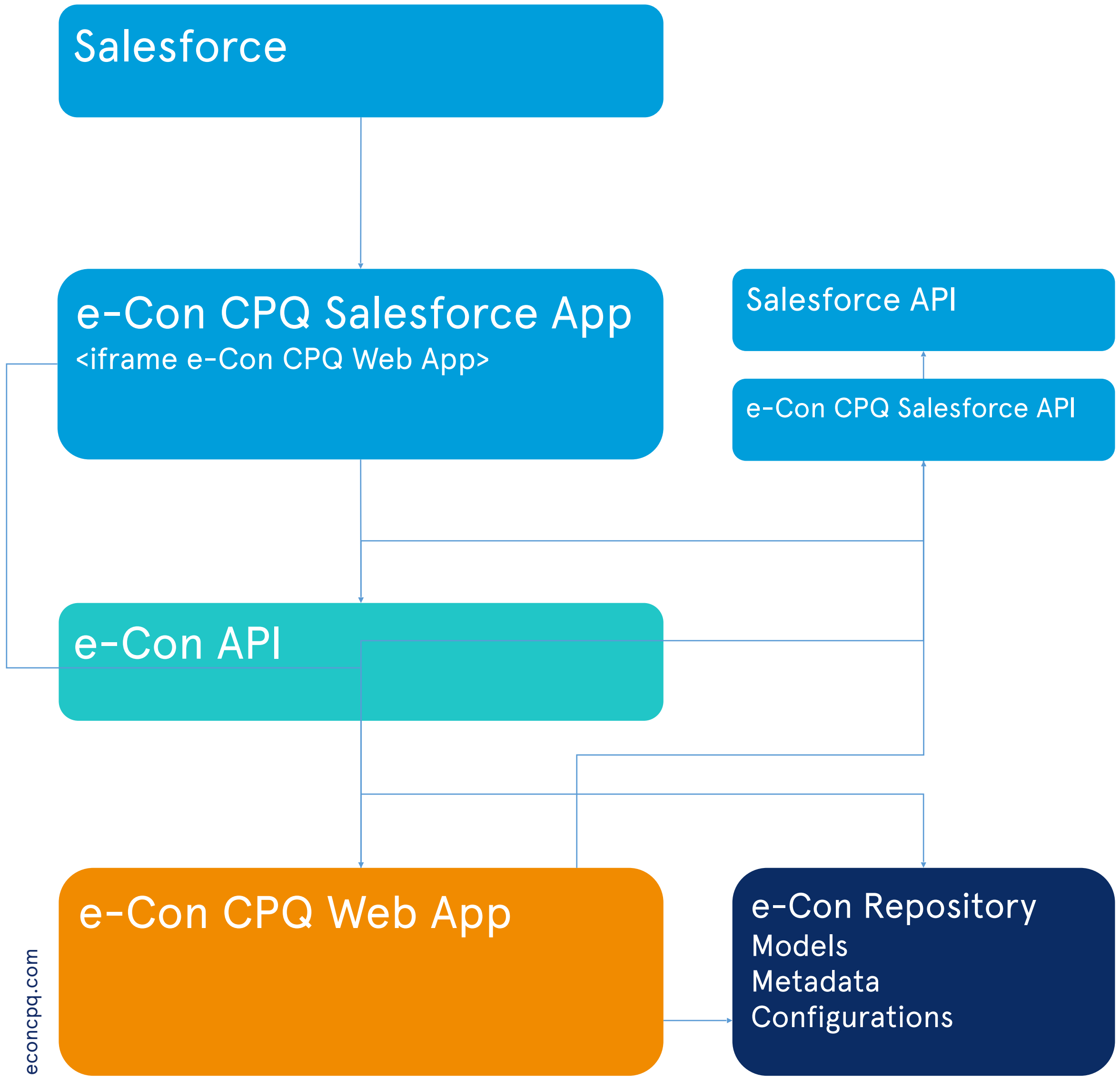
e-Con CPQ for Salesforce

This factsheet offers a technical description of the solution hundreds of businesses are using for advanced configuration.

In Salesforce the Salesforce e-Con CPQ app has been installed and the setup of it is ready (the e-Con API base url + authentication defined). That Salesforce e-Con CPQ app component can be placed for example on a tab in the Quote form (or other entities). When the tab with the Salesforce e-Con CPQ app will be active the following communication will be started:



1. The Salesforce e-Con CPQ app sends a GetConfiguration request to the e-Con API with a parameters Entity = "Quote", RecordId = the id of the current Quote.

2. The e-Con API returns the information about the configuration if a configuration exists (continue with 2.a) or returns no configuration information if no configuration for the current Quote exists yet (continue with 2.b)

   - The Salesforce e-Con CPQ App sends a CreateSession request to the e-Con API with as parameter the configuration info
   - The e-Con API sends a request to the e-Con CPQ App (the one outside Salesforce) to open the configuration
   - When the configuration session has been started the e-Con API returns the session information to the Salesforce e-Con CPQ app
   - The Salesforce e-Con CPQ app receives the session information and uses the url in the session info to show the e-Con CPQ app (the one outside Salesforce) in an iframe

   2.b

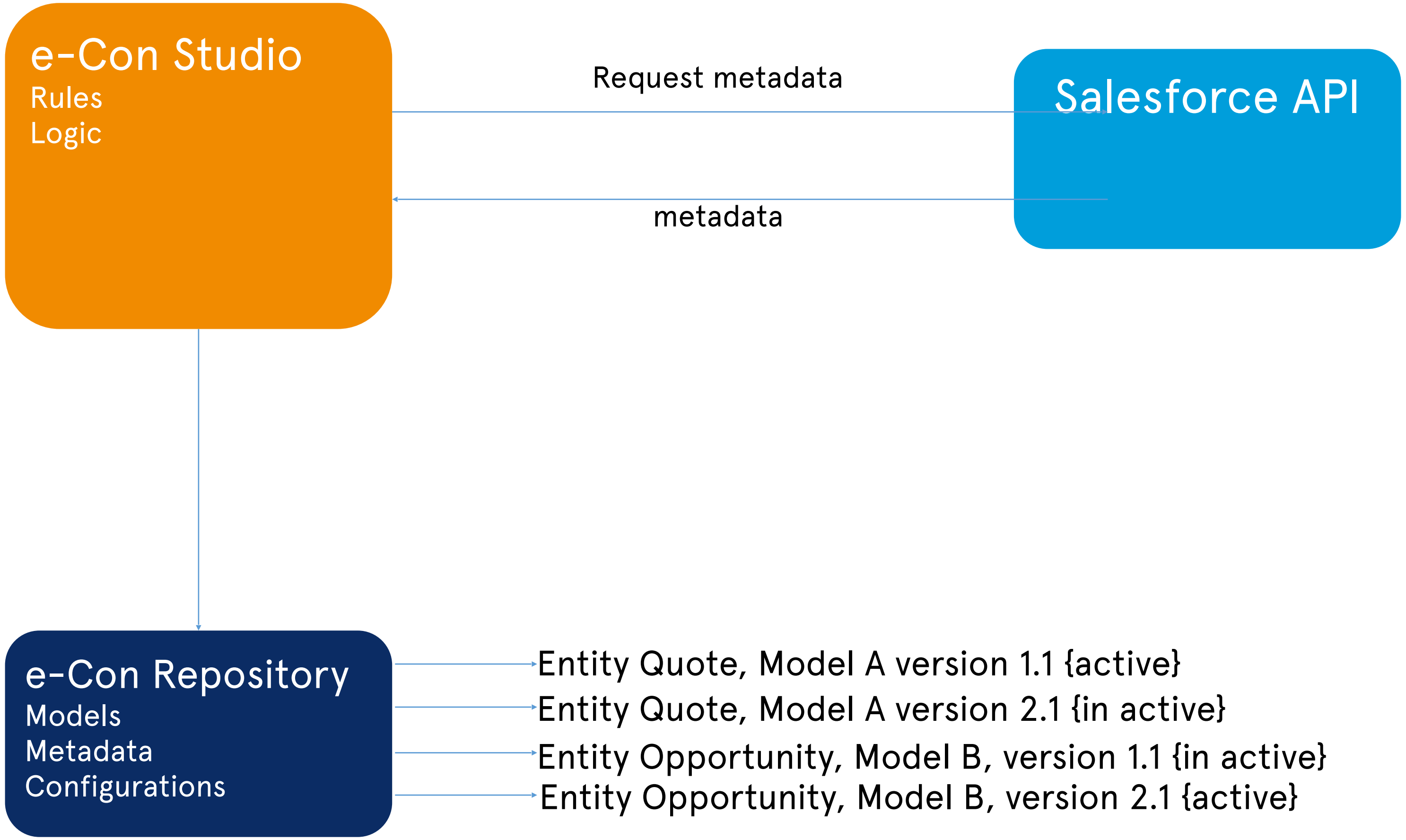
   - The Salesforce e-Con CPQ App sends a GetModels request to the e-Con API with as parameter the name of the entity: "Quote"
   - The e-Con API returns a list of the active models for entity "Quote"
   - The Salesforce e-Con CPQ App shows the list of models and the users choose one model
   - The Salesforce e-Con CPQ App sends a CreateSession request to the e-Con API with as parameter the selected model
   - The e-Con API sends a request to the e-Con CPQ App (the one outside Salesforce) to open a new configuration for the selected model
   - When the configuration session has been started the e-Con API returns the session information to the Salesforce e-Con CPQ app
   - The Salesforce e-Con CPQ app receives the session information and uses the url in the session info to show the e-Con CPQ app (the one outside Salesforce) in an iframe

3. The e-Con CPQ app (running in the iframe) guides the user to specify the Quote. The data functions of the e-Con CPQ app can retrieve data from Salesforce by sending requests to the Salesforce API.

4. When the users submits the configuration the Quote information will be send to the e-Con CPQ Salesforce API (part of the Salesforce e-Con CPQ app). Of course the user can also cancel the configuration session. In that case no Quote information will be sent to the e-Con CPQ Salesforce API. In the case that processing will be executed asynchronous the result will be post to the e-Con API, instead of a direct response to the e-Con CPQ Web App.

5. The Salesforce e-Con CPQ app receives a message from the e-Con CPQ (running in the iframe) that the configuration session has been finished and will show the result in Salesforce.

How Metadata modelling look like in e-Con CPQ for Salesforce?



1. A model is created within the studio
2. With the e-Con metadata tool you select the entities that you want to build the models with
3. You build a new model with and in the e-Con Studio. In your model you could access and retrieve direct data from Salesforce.
4. When a model with an active version is stored in the repository, you can access this model from Salesforce CPQ.

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e-Con