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Customization Guide - SAP CPQ - Callidus

Version

This article was created using the 2105 version of SAP CPQ Former (Callidus)

Brief Description

After months of a good work, it's time to Go-Live and see what happens with your baby in the real world. Yes, that's right. It's the moment to transport your CPQ's Solution to Production Tenant. That's what I will talk about on this document. I will describe step by step how to transport your objects to another tenant.

I hope you enjoy it!!

Author

I started my career in 1992, working with corporative solutions in mining companies. In 1999, I changed my professional perspective and started my first project in CRM business, using Vantive in Telecom Industries, which I spent 8 years working as CRM Telecom Solution Architect.

Then, in 2006 I was invited to work on my first project as SAP CRM Functional Consultant in Utilities. I have plenty of experience in different modules and submodules inside of SAP CRM. I am an expert in the Interaction Center, Sales, Services, Marketing, and ERP Integrations.

Besides the baseline of SAP CRM, I had the opportunity to work in a different line of business, as Goods, Trade Promotion, Media, Call Center, Mining, Utilities, Heavy Machinery.

With the SAP Cloud technologies, I've become an expert in Cloud solutions and Customer Experience using the platform C4hana (C4Sales, C4Services, Marketing, Qualtrics, CDC/Gigya, CPQ/Callidus).

During those projects, the integration with SAP ERP (ECC and S4hana) became obligatory and the understanding of the integration between S4hana and C4hana was extremely necessary to adequate the CX process and ERP process.

Considering the integration between SAP C4hana and S4hana. It became so necessary, then I concentrate my energy to understand how it works. Today I am an expert in integrating SAP C4hana and S4hana using SAP Cloud Platform Integration.

Below I will describe all points of my carrer and just in case you have doubts about any points, please let me know.

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1. Article

1.1. Description

In the SAP CPQ’s solution there are a functionality to transport your configuration, phyton code, actions, custom tables and much more. Below I am listing the objects available so far to be transported to Production Tenant.

SAP CPQ’s transport the following objects.

Approval Rules	Custom Tables	Quote Item Custom Fields
Cart Level Aggregates	Global Scripts	Quote Tables
Categories	Guided Selling	Responsible Templates
CRM Integration	Item Actions Workflow	Territories
Currencies	Markets	User Types
Custom Actions	Notifications	Workflow
Custom Calculations	Permissions	
Custom Fields	Product	

Now, let’s stop talking and demonstrate how to do it.

1.2. Creating a new Custom Table

To demonstrate the transport process, I will create a new table in the CPQ’s test environment clicking the “Define New” button.

SAP Sales Cloud

Search Menu

Setup Home

System Performance

Business Performance

Product Catalog

Products

Categories

Attributes

Attribute Visibility Restrictions

Unit of Measurement

Product Types

Custom Tables

Sequences

SEQ Substitution

Guided Selling

Set Favorites Permissions

Product Comparison

Pricing/Calculations

Quotes

Users

Custom Tables

Show hidden tables

Define NewImport New

Search

Table Name

Number of Columns

Number of Records

Date Modified

Modified By

Personally Identifiable Information

Pricing7391/1/2012 12:00:00 AMJohn SmithNo

ProductData402/7/2021 8:47:06 AMClaudio GoulartNo

Number of items: 2

Items per page: 10

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Then, I will put the name and fields related to that table. Nothing special, just for our test.

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Product Types

Custom Tables

Sequences

SEQ Substitution

Guided Selling

Set Favorites Permissions

Product Comparison

Pricing/Calculations

Quotes

Add New Table

* Table Name:ModuloCRMTransport☐ Hidden in setup

* Audit Trail level: Audit at Field Level

Column Name	Column Type	Length/Decimal places	Is Nullable	Personally Identifiable Information	Sensitive Data
PartNumber	NVARCHAR	250	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Price	NVARCHAR	250	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> [Undo Column]
Cost	NVARCHAR	250	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> [Undo Column]

[Add New Column]

Save

That’s it, our table was created. Now, I will create a record to this table to keep this thing interesting.

Custom Tables

Show hidden tables ☐

Define New

Import New

Search

	Table Name	Number of Columns	Number of Records	Date Modified	Modified By	Personally Identifiable Information
	Pricing	7	39	1/1/2012 12:00:00 AM	John Smith	No
	ProductData	4	0	2/7/2021 8:47:06 AM	Claudio Goulart	No
	ModuloCRMTransport	6	0	5/28/2021 7:19:18 AM	Claudio Goulart	No

Number of items: 3

Items per page: 10

Some data were typed and click on the “Save” Button

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SAP Sales Cloud

Domain

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Unit of Measurement

Product Types

Custom Tables

MODULOCRMTRANSPORT

PartNumber	<input type="text" value="MODCRM"/>
Price	<input type="text" value="100"/>
Cost	<input type="text" value="50"/>

SaveSave and New

I can see the record below.

View Table Entries: MODULOCRMTRANSPORT

Created by:claudio.goulart@modulocrm.com.br on 5/28/2021 7:19:18 AM

Modified by:claudio.goulart@modulocrm.com.br on 5/28/2021 7:20:57 AM

Add New

Search

PartNumber

Price

Cost

CpqTableEntryModifiedBy

CpqTableEntryDateModified

CpqTableEntryId

MODCRM

100

50

claudio.goulart@modulocrm.com....

5/28/2021 7:20:57 AM

1

Number of items: 1

Items per page: 10

Custom Table Export

Delete All Entries

Import Entries

Export

☒ entries listed above

☐ all entries that match entered criteria

☐ all entries

Export as

☒ Excel

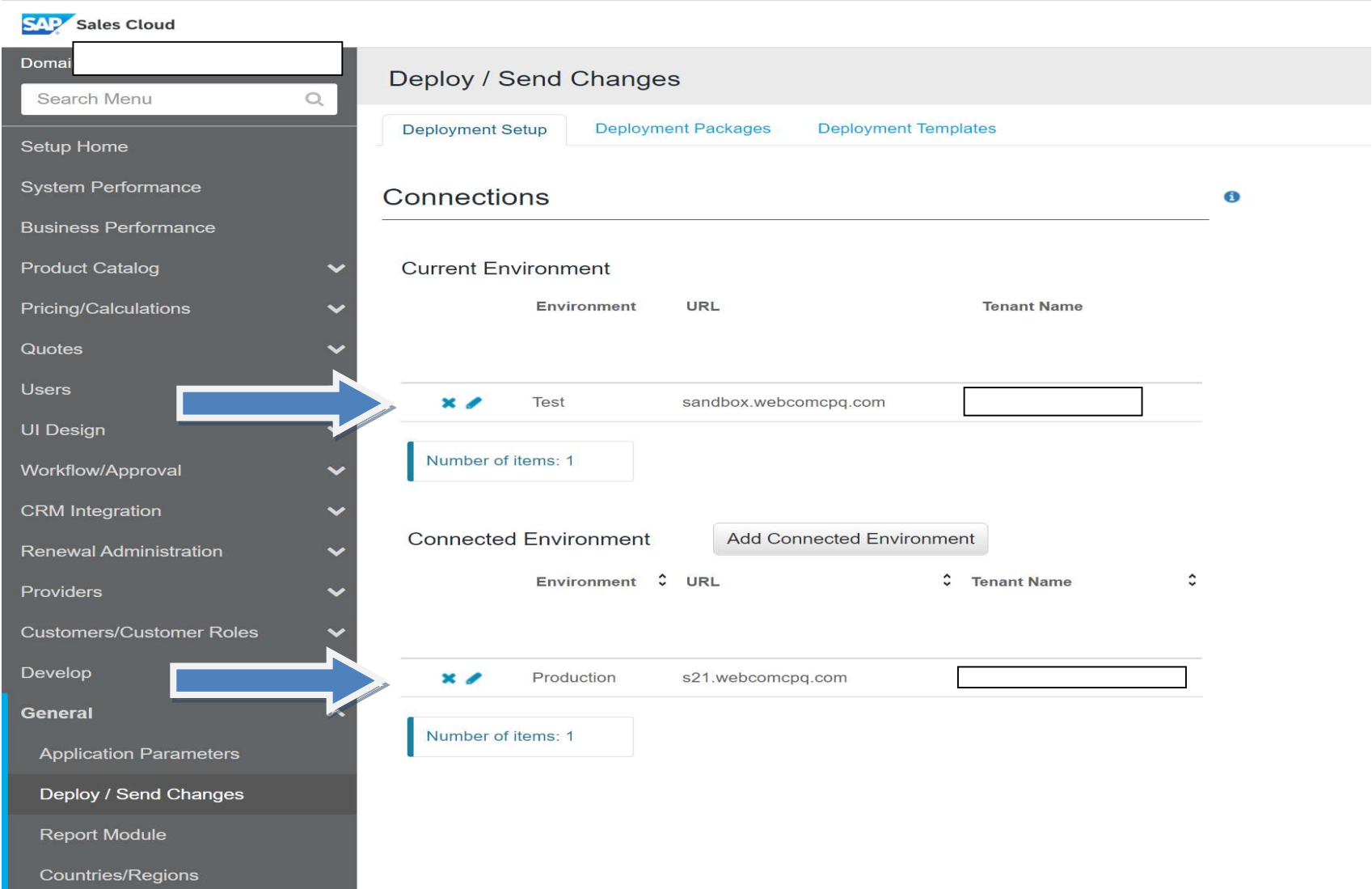
☐ ZIP

Export

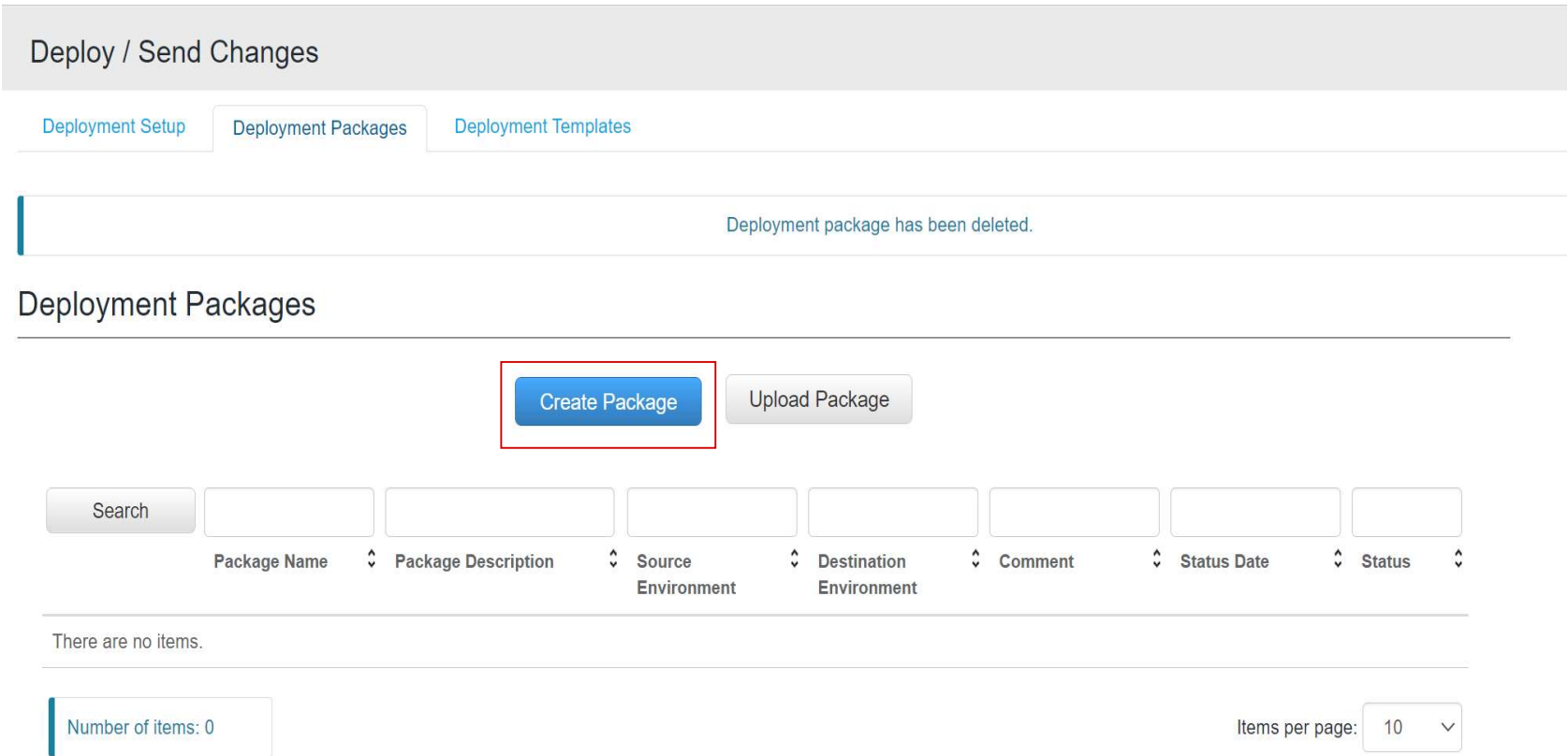
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1.3. Creating the Deployment Packages

After creating our custom table, I will create a deployment package to send our object to Production Tenant.
Check it out! I have already defined the source and the target tenant, then I will click the link below “Deployment Packages”.



Click the button “Create Package”



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I will give it a name “ModuloCRM_Transport”

Deploy / Send Changes

Deployment Setup

Deployment Packages

Deployment Templates

Create New Package

Name

ModuloCRM_Transport

Description

ModuloCRM_Transport

Comment

Destination Environment

Production (MODULOSERVICO_PRD)

Then, I am going to define which object will be transported to production. On the Package Component list, I will choose the objects available are ready to be transport.

Deployment Package Component

Select Components

Apply Template

Package Component

Approval Rule

Add

Search

Change Type

Name

Description

Creation Date

Created by

There are no items.

Number of items: 0

Items per page: 10

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To our test, I will choose the “Custom Tables”, and click the Add button.

Deployment Package Component

Select Components

Apply Template

Package Component

Custom tables

Add

Search

Change Type

Name

Description

Creation Date

Created by

There are no items.

Number of items: 0

Items per page: 10

Save

I will select my table “ModuloCRMTransport” then click the button “Add” below.

Name

ModuloCRMTables

Description

ModuloCRMTables

All Custom tables

Selected Custom tables

Custom tables:

Selected Custom tables:

Pricing

ProductData

ModuloCRMTransport

Add to Package

Go Back

Sending Checklist

Selected Custom tables will be sent to destination Environment. Maximum size of the packed tables cannot exceed 20Mb.

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So far so good, click the button “Add to Package”

Custom tables:

Pricing

ProductData

Selected Custom tables:

ModuloCRMTransport

Add to Package

Go Back

Then, click the button Save and our package is ready to be deployed.

Deployment Package Component

Select Components

Apply Template

Package Component

Approval Rule

Add

Search

Change Type

Name

Description

Creation Date

Created by

Custom table

ModuloCRMTables

ModuloCRMTables

5/28/2021 7:28:22 AM

Claudio Goulart

Number of items: 1

Items per page: 10

Save

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1.4. Sending the package to Production Tenant

Easy isn't it??

Now, I will transport the package to the target tenant clicking the button "Send"

Deploy / Send Changes

Deployment Setup | Deployment Packages | Deployment Templates

Deployment Packages

Create Package | Upload Package

Search

Package Name

Package Description


Source Environment

Destination Environment

Comment

Status Date

Status

	ModuloCRM_Transport	ModuloCRM_Transport	Test (moduloservico_tst)	Production (MODULOSERVICO_PRD)		5/28/2021 7:29:15 AM	Edited
---	---------------------	---------------------	--------------------------	--------------------------------	--	----------------------	--------

Number of items: 1

Items per page: 10

That's it!! Everything is cool and our package have the status "Sent"

Deploy / Send Changes

Deployment Setup | Deployment Packages | Deployment Templates

Package 'ModuloCRM_Transport' was sent to Production (MODULOSERVICO_PRD) environment.

Deployment Packages

Create Package | Upload Package

Search

Package Name

Package Description


Source Environment

Destination Environment

Comment

Status Date

Status

	ModuloCRM_Transport	ModuloCRM_Transport	Test (moduloservico_tst)	Production (MODULOSERVICO_PRD)		5/28/2021 7:29:15 AM	Sent
---	---------------------	---------------------	--------------------------	--------------------------------	--	----------------------	------


Number of items: 1

Items per page: 10

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1.5. Deploying the Solution

Now, I am going to logging into the Production Tenant



Username

claudio

Password

.....

Domain

MODULO

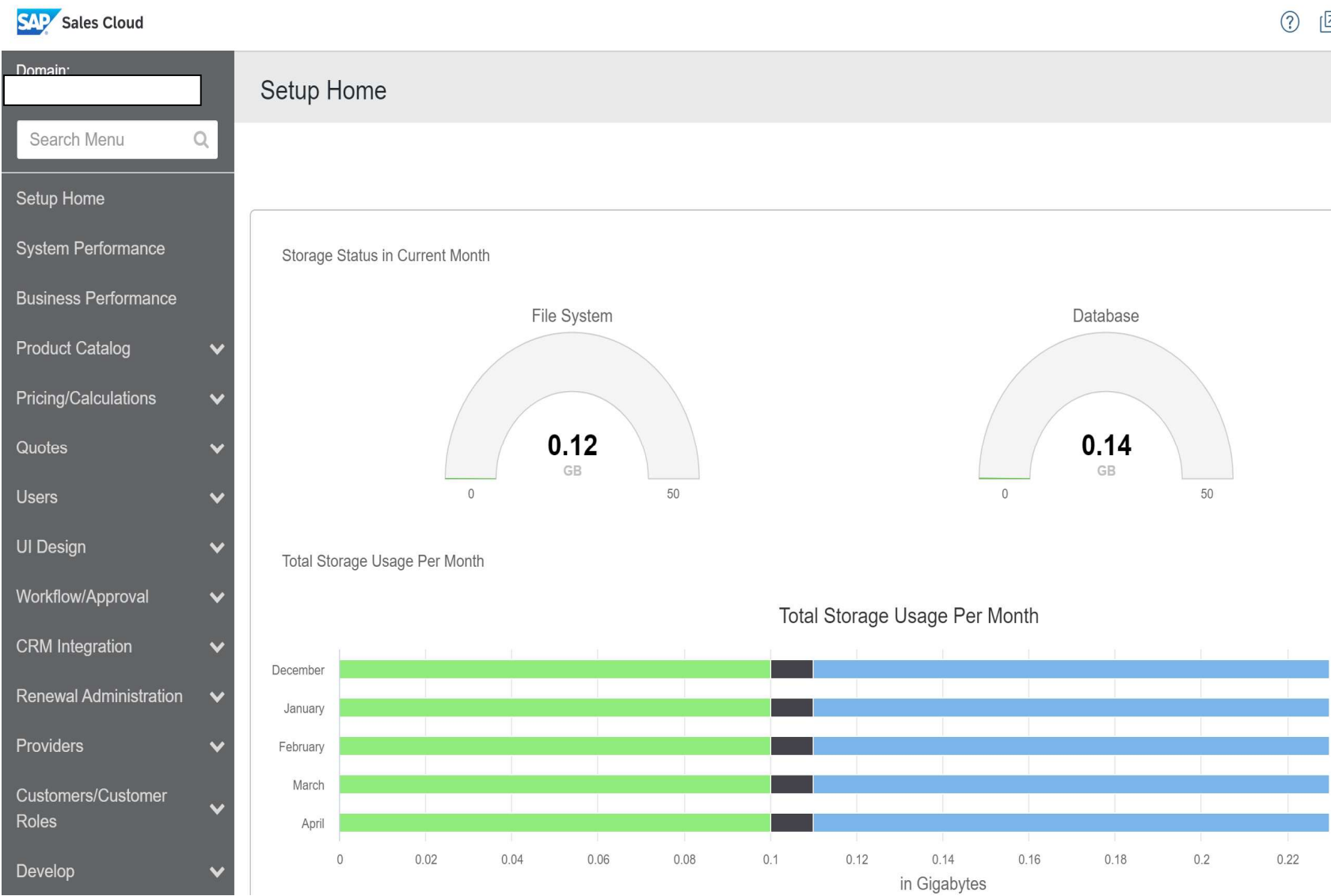
☒ Remember me

Login

Forgot Password

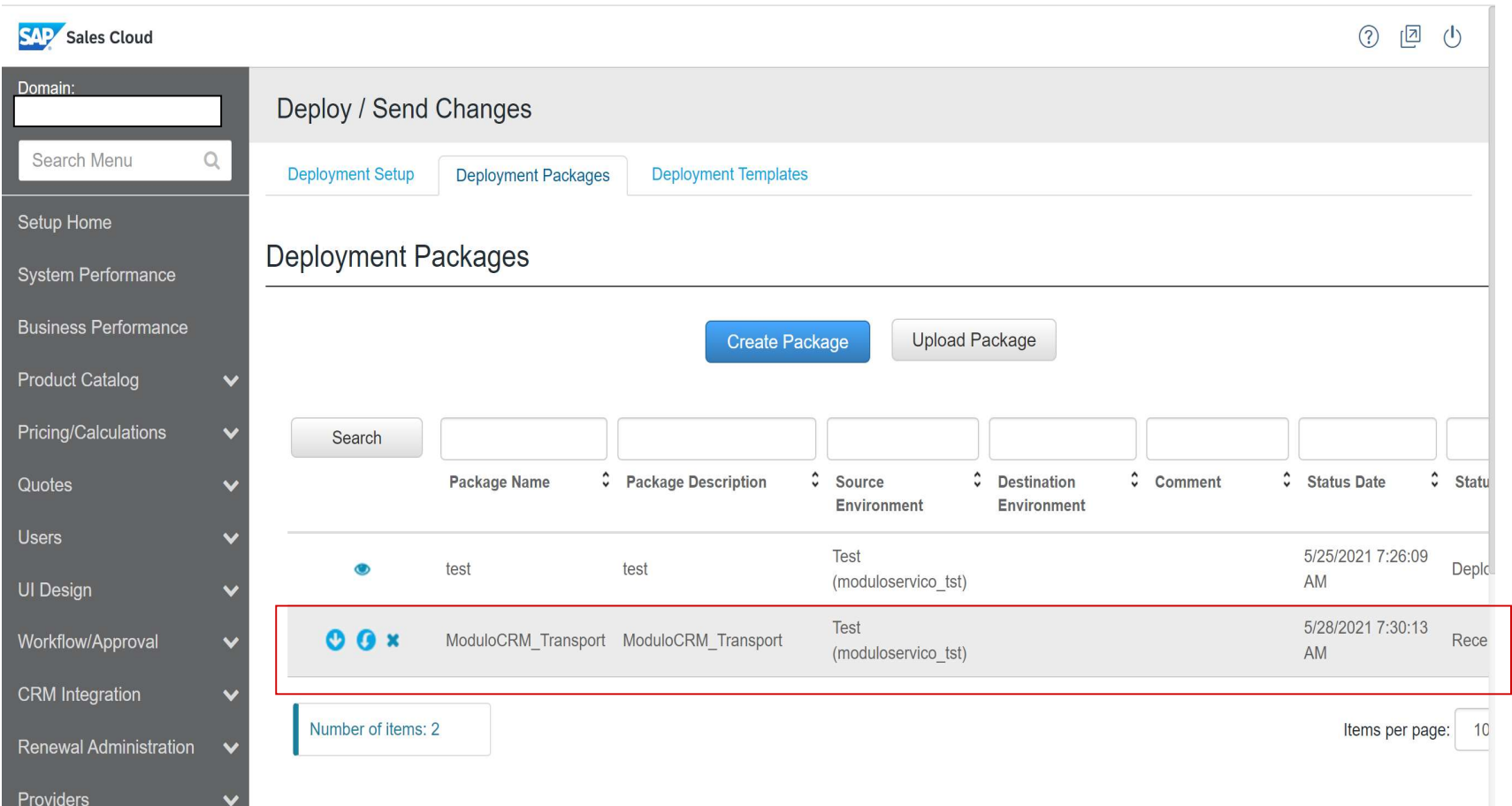
Register

Logged.

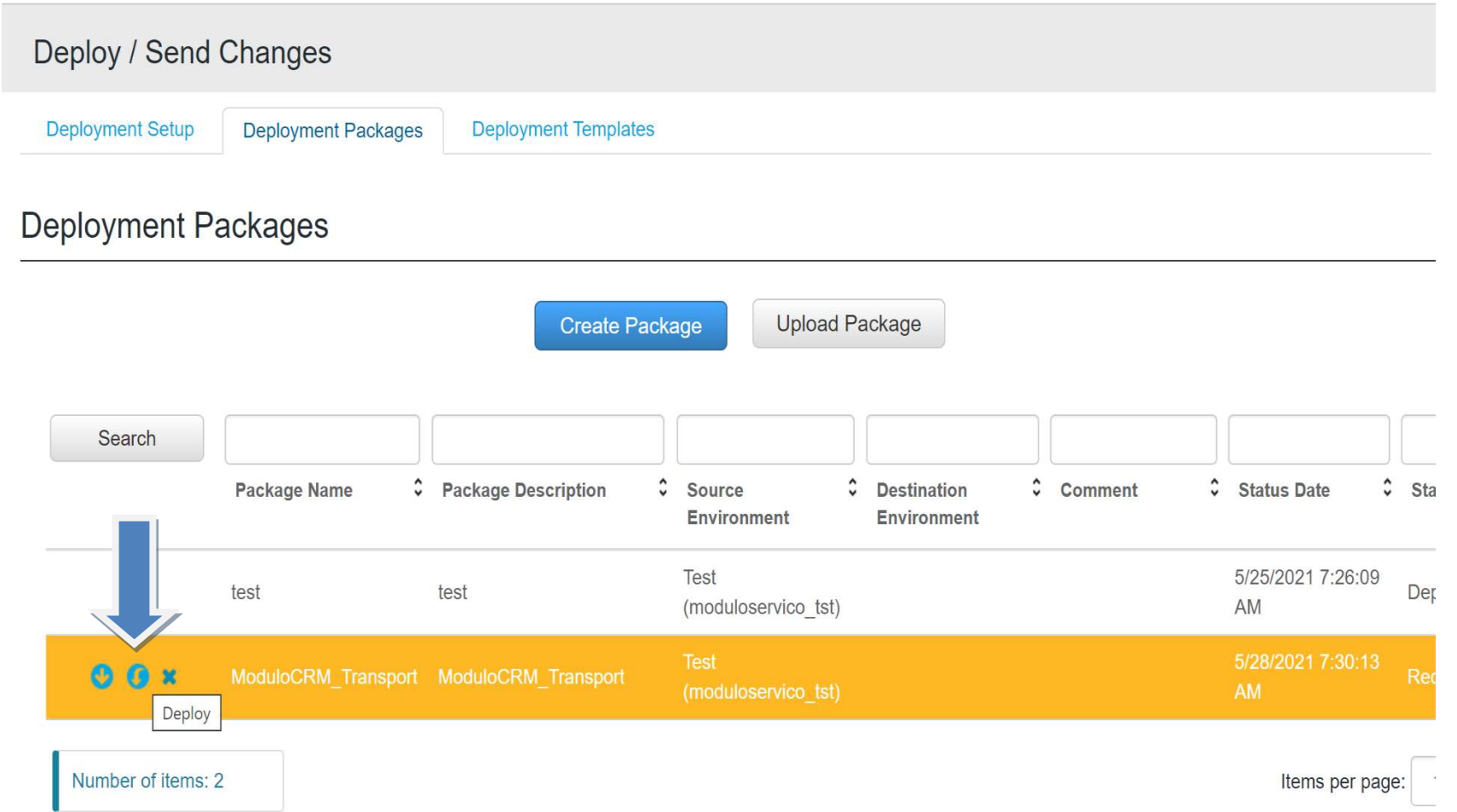


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Now, I can see the package “ModuloCRM_Transport”



To deploy the package, I will click the button indicated below “Deploy”.



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Then, click the button “Deploy”

Deploy / Send Changes

Deployment Setup

Deployment Packages

Deployment Templates

Deployment Package Component

Search

Change Type

Name

Description

Creation Date

Deployment Order

	Custom table	ModuloCRMTables	ModuloCRMTables	5/28/2021 7:28:22 AM	1
--	--------------	-----------------	-----------------	----------------------	---

Number of items: 1

Items per page: 10

Deployment Questionnaire

Custom tables

Update existing custom tables

☐ Yes (all Custom Tables will be updated)

☒ No (Only new Custom Tables will be created)

Deploy

Our package has the status “Deployed”

Deploy / Send Changes

Deployment Setup

Deployment Packages

Deployment Templates

'ModuloCRM_Transport' package has been successfully deployed.

Deployment Packages

Create Package

Upload Package

Search

Package Name

Package Description

Source Environment

Destination Environment

Comment

Status Date

Status

	test	test	Test (moduloservico_tst)			5/25/2021 7:26:09 AM	Deployed
	ModuloCRM_Transport	ModuloCRM_Transport	Test (moduloservico_tst)			5/28/2021 7:35:35 AM	Deployed

Number of items: 2

Items per page: 10



Deployed

Deployed

Deployed

Deployed

Deployed

Deployed

Deployed

Deployed

Deployed

Deployed

Deployed

Deployed

Deployed

Deployed

Deployed

Deployed

Deployed

Deployed

Deployed

Deployed

Deployed

Deployed

1.6. Checking the object deployed

Now, I am going to check my table and the record that I had created before on this document. The table “ModuloCRMTransport” was created and see, the record saved before was transported as well. Let’s see how the record is.

SAP Sales Cloud

Domain: MODULOSERVICO_PRD

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Attribute Visibility Restrictions

Unit of Measurement

Product Types

Custom Tables

Custom Tables

Show hidden tables

Define NewImport New

Search

Table Name

Number of Columns

Number of Records

Date Modified

Modified By

Pricing7391/1/2012 12:00:00 AMJohn Smith

ProductData405/25/2021 7:26:08 AMClaudio Goulart

ModuloCRMTransport615/28/2021 7:35:35 AMClaudio Goulart

Number of items: 3

The custom table was deployed and the data storage in the Test Tenant was transported too.

That’s cool, I hope you enjoyed it!! See you.

View Table Entries: MODULOCRMTRANSPORT

Created by:claudio.goulart@modulocrm.com.br on 5/28/2021 7:35:35 AM

Modified by:claudio.goulart@modulocrm.com.br on 5/28/2021 7:35:35 AM

Add New

Search

PartNumber

Price

Cost

CpqTableEntryModifiedBy

CpqTableEntryDateModified

CpqTableEntryId

MODCRM10050claudio.goulart@modulocrm.c...5/28/2021 7:35:35 AM1

Number of items: 1

Items per page: 10

Custom Table Export

Delete All Entries

Import Entries

Export

entries listed above

all entries that match entered criteria

all entries

Export as

Excel

ZIP

Export