

Post Installation Guidelines

Security Settings

Step 1 - Check if the Remote Site Settings is Active

Remote Site Details (Managed)

 This Remote Site Setting is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Remote Site Detail		Edit	Delete	Clone
Remote Site Name	AWS_Remote_Site			
Namespace Prefix	IntelliConfig			
Installed Package	IntelliConfig			
Remote Site URL	http://ec2-3-111-119-219.ap-south-1.compute.amazonaws.com			
Disable Protocol Security	☐			
Description				
Active	☒			

Step 2 - Go to Permission set and select IntelliConfigAdmin

Permission Sets

On this page you can create, view, and manage permission sets.

Intelliconfig Permission sets ▾		Edit	Delete	Create New View
New				
☐	Action	Permission Set Label ↑		
☐	Clone	IntelliConfigAdmin		
☐	Clone	IntelliConfigUser		

Step 3 - Click on “Manage Assignments” button -> Click on “Add Assignment” button
-> Select System Administrator User -> Click Next and Assign

Step 4 - Create other user personas by clicking on “New User” -> Select License as Salesforce and profile as “Standard User”

Step 5 - Go to Permission set and select IntelliConfigUser

Permission Sets

On this page you can create, view, and manage permission sets.

Intelliconfig Permission sets ▼ [Edit](#) | [Delete](#) | [Create New View](#)

New



☐	Action	Permission Set Label ↑
☐	Clone	IntelliConfigAdmin
☐	Clone	IntelliConfigUser

Step 6 - Click on “Manage Assignments” button -> Click on “Add Assignment” button -> Select Standard/Active User -> Click Next and Assign

Select an Expiration Option For Assigned Users

☒ No expiration date ⓘ

☐ Specify the expiration date

1 Day

1 Week

30 Days

60 Days

Custom Date

ⓘ Time Zone

Select a time zone...

Selected Users

Full Name ▼	Role ▼	Profile ▼	Active	User License ▼	Expires On ▼
testuser Intelliconfig		Standard User	✓	Salesforce	Never Expires

[Cancel](#)

[Back](#)

[Assign](#)

Vlocity CPQ Settings

For Vlocity CPQ setup, kindly ensure sequential execution of steps in the order mentioned below:

Step 1 - Login to workbench - <https://workbench.developerforce.com/login.php>

Step 2 - Go to Migration Tab -> Select Deploy -> Choose CustomMetadata.zip -> Next-> Deploy

workbench

info ▾

queries ▾

data ▾

migration ▾

utilities ▾

DeployMANIKA GOYAL AT INTELICLOUD SOLUTIONS ON API 58.0



Successfully staged 9 KB zip file CustomMetadata.zip for deployment.

Confirm the following deployment options:

[Expand All](#) | [Collapse All](#)

- ❏ allowMissingFiles: **false**
- ❏ autoUpdatePackage: **false**
- ❏ checkOnly: **false**
- ❏ ignoreWarnings: **false**
- ❏ performRetrieve: **false**
- ❏ purgeOnDelete: **false**
- ❏ rollbackOnError: **false**
- ❏ singlePackage: **false**
- ❏ testLevel: **NoTestRun**
- ❏ runTests:

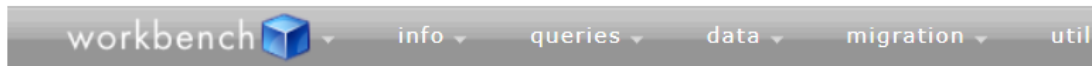


Warning, this deployment will make permanent changes to this organization's metadata and cannot be rolled back. Use the 'Check Only' option to validate this deployment without making changes.

Deploy

Requested in 0.003 sec
Workbench 58.0.0

Check Results-> Success -> True



Metadata API Process Status

MANIKA GOYAL AT INTELLICLOUD

A Metadata API operation has been performed, which requires asynchronous processing as re available. Refresh this page periodically to view the latest status. Results will be available once complete.

Status

Id	0AfHs000014FJX0KAO	Done	true
Status	Succeeded	Check Only	false
Rollback On Error	false	Ignore Warnings	false
Number Component Errors	0	Number Test Errors	0
Number Components Deployed	21	Number Tests Completed	0
Number Components Total	21	Number Tests Total	0
Created Date	2024-07-24T05:26:54.000Z	Start Date	2024-07-24T05:26:54.000Z
Last Modified Date	2024-07-24T05:27:00.000Z	Completed Date	2024-07-24T05:27:00.000Z
Created By	005Hs00000BqaCJ	Created By Name	Manika
Run Tests Enabled	false		

Results

[Expand All](#) | [Collapse All](#)

- success: **true**
- componentSuccesses (22)
- runTestResult (3)

Step 3 - Login to Vlocity Org and validate the custom metadata is created properly

EPCConfigs

[Help for](#)

View: New View Edit Create New View		New				
Action	Label	EPCConfig Name	Namespace Prefix	Protected Component	key	value
Edit Del	ACTION_TYPE	ACTION_TYPE		☐	ACTION_TYPE	Add/Update
Edit Del	B2C_PRICELISTID	B2C_PRICELISTID		☐	B2C_PRICELISTID	a2mHs000004PUEAIA4
Edit Del	DISPLAY_TYPE	DISPLAY_TYPE		☐	DISPLAY_TYPE	Dropdown
Edit Del	IS_ACTIVE	IS_ACTIVE		☐	IS_ACTIVE	true
Edit Del	MAX_QUANTITY	MAX_QUANTITY		☐	MAX_QUANTITY	1
Edit Del	MIN_QUANTITY	MIN_QUANTITY		☐	MIN_QUANTITY	1
Edit Del	OBJECT_FIELD_OBJECT_TYPE	OBJECT_FIELD_OBJECT_TYPE		☐	OBJECT_FIELD_OBJECT_TYPE	vlocity_cmt_ObjectClass__c
Edit Del	OBJECT_TYPE	OBJECT_TYPE		☐	OBJECT_TYPE	Product2
Edit Del	OBJECT_TYPE_NAME	OBJECT_TYPE_NAME		☐	OBJECT_TYPE_NAME	BASE Product Spec Type
Edit Del	OBJECTCLASSID	OBJECTCLASSID		☐	OBJECTCLASSID	a1yHs000006z2EyIAI
Edit Del	OBJECTCLASSIDFOROFFER	OBJECTCLASSIDFOROFFER		☐	OBJECTCLASSIDFOROFFER	a1yHs000006z2FCIAY
Edit Del	OBJECTFIELDOBJECTCLASSID	OBJECTFIELDOBJECTCLASSID		☐	OBJECTFIELDOBJECTCLASSID	a1yHs000006z2EdIAI
Edit Del	PRICING_ELEMENT_ID	PRICING_ELEMENT_ID		☐	PRICING_ELEMENT_ID	a45Dn000000yXaIAI
Edit Del	PRICING_VARIABLE_CODE	PRICING_VARIABLE_CODE		☐	PRICING_VARIABLE_CODE	REC_MNTH_STD_PRC_ADJ_ABS
Edit Del	QUANTITY	QUANTITY		☐	QUANTITY	1
Edit Del	UPDATE_SCOPE	UPDATE_SCOPE		☐	UPDATE_SCOPE	Update Item and Child Items
Edit Del	VALUEDATA_TYPE	VALUEDATA_TYPE		☐	VALUEDATA_TYPE	Picklist

Show me [fewer](#) records per list page

Step 4 - Repeat steps 2 & 3 to Deploy Apex.zip

Metadata API Process Status

MANIKA GOYAL AT INTELICLOUD SOLUTIONS ON API 58.0

A Metadata API operation has been performed, which requires asynchronous processing as resources are available. Refresh this page periodically to view the latest status. Results will be available once processing is complete.

Status

Id	0AfHs000014FJbgKAG	Done	true
Status	Succeeded	Check Only	false
Rollback On Error	false	Ignore Warnings	false
Number Component Errors	0	Number Test Errors	0
Number Components Deployed	24	Number Tests Completed	0
Number Components Total	24	Number Tests Total	0
Created Date	2024-07-24T05:45:11.000Z	Start Date	2024-07-24T05:45:11.000Z
Last Modified Date	2024-07-24T05:45:22.000Z	Completed Date	2024-07-24T05:45:22.000Z
Created By	005Hs00000BqaCJ	Created By Name	Manika Goyal
Run Tests Enabled	false		

Results

[Expand All](#) | [Collapse All](#)

- success: **true**
- componentSuccesses (25)
- runTestResult (3)

Verify classes mentioned in below image are deployed in your org

Results

[Expand All](#) | [Collapse All](#)

- success: **true**
- componentSuccesses (25)
 - unpackaged/objects/ProductCodeTracker__c.object (ProductCodeTracker__c.LastTimestamp__c)
 - unpackaged/objects/ProductCodeTracker__c.object (ProductCodeTracker__c.LastCode__c)
 - unpackaged/classes/CreatePricingForProduct.cls
 - unpackaged/classes/CreatePricingForProductTest.cls
 - unpackaged/classes/EPCInterfaceChildClass.cls
 - unpackaged/classes/EPCInterfaceChildClassTest.cls
 - unpackaged/classes/EPCInterfaceClass.cls
 - unpackaged/classes/EPCInterfaceClassTest.cls
 - unpackaged/classes/EPCInterfaceParentClass.cls
 - unpackaged/classes/EPCInterfaceParentClassTest.cls
 - unpackaged/package.xml
 - unpackaged/classes/EPCInterfaceRelationClassTest.cls
 - unpackaged/classes/GetChildProductInformation.cls
 - unpackaged/classes/GetChildProductInformationTest.cls
 - unpackaged/classes/GetParentProductInformation.cls
 - unpackaged/classes/GetParentProductInformationTest.cls
 - unpackaged/classes/InsertProduct.cls
 - unpackaged/classes/InsertProductTest.cls
 - unpackaged/classes/UpdateAttributeAssignment1.cls
 - unpackaged/classes/UpdateAttributeAssignment1Test.cls
 - unpackaged/objects/ProductCodeTracker__c.object
 - unpackaged/objects/ProductCodeTracker__c.object (ProductCodeTracker__c.All)
 - unpackaged/classes/CreatePricingElementForProductTest.cls
 - unpackaged/classes/CreatePricingElementForProduct.cls
 - unpackaged/classes/EPCInterfaceRelationClass.cls
- runTestResult (3)

Step 5 - Repeat Steps 2 & 3 to Deploy LWC.zip

Verify below LWC component is deployed in your org

Metadata API Process Status

MANIKA GOYAL AT INTELICLOUD SOLUTIONS ON API 58.0

A Metadata API operation has been performed, which requires asynchronous processing as resources are available. Refresh this page periodically to view the latest status. Results will be available once processing is complete.

Status

Id	0AfHs000014FJcAKAW	Done	true
Status	Succeeded	Check Only	false
Rollback On Error	false	Ignore Warnings	false
Number Component Errors	0	Number Test Errors	0
Number Components Deployed	1	Number Tests Completed	0
Number Components Total	1	Number Tests Total	0
Created Date	2024-07-24T05:48:34.000Z	Start Date	2024-07-24T05:48:37.000Z
Last Modified Date	2024-07-24T05:48:38.000Z	Completed Date	2024-07-24T05:48:38.000Z
Created By	005Hs00000BqaCJ	Created By Name	Manika Goyal
Run Tests Enabled	false		

Results

[Expand All](#) | [Collapse All](#)

- success: true
- componentSuccesses (2)
 - unpackaged/lwc/lwcIntelliProductInfo
 - unpackaged/package.xml
- runTestResult (3)

Step 6 - Steps to Install IP_configureProduct Integration Procedure

- Download and unzip IP_configureProduct.zip
- In AppLauncher, Search for Integration Procedures
- Click on Import button on the top Right side next to New Button



Sales Home Leads Accounts Opportunities Products Tasks Files Contacts Campaigns Dashboards Chatter Reports Groups *OmniStudio Integration Pr... X More

OMNISTUDIO

Integration Procedures

As of Jul 24, 2024 11:25 AM - Viewing as Manika Goyal

↺ ↻ ↵

New Import

TYPE	DESCRIPTION	LAST MODIFIED ...	LAST MODIFIED BY	ACTIVE	TEST
------	-------------	-------------------	------------------	--------	------

4. Browse and select IP_configureProduct.json file

Select File

File Name

IP_configureProduct.json

Browse

Or drag and drop a datapack on to the window.

Cancel

Next

5. Click Next 3 times and your import will start
6. Activate the Integration Procedure - Select Activate Now button

Import Complete

You can now activate the components.

Activate Later

Activate Now

Click Next

Select Items to Activate

Integration Procedure (1)

☒

IP_configureProduct

7. After Activation, go to Integration Procedures and in search type "IPconfigure"

8. Locate the Integration Procedure

OMNISTUDIO

Integration Procedures

As of Jul 24, 2024 11:35 AM - Viewing as Manika Goyal

☐ TYPE

☒ IPconfigure/productAPI

☐ IP_configureProduct (Version 5)

9. Check for The below components in Integration Procedure

[< Go Back](#)
INTEGRATION PROCEDURE DESIGNER
IP_configureProduct Active

AVAILABLE COMPONENTS

STRUCTURE

PROPERTIES

Groups

Cache Block

Conditional Block

Try Catch Block

Actions

Batch Action

Calculation Action

Procedure Configuration

RA_createProduct

RA_createRelationship

DR_createPricingElement

DR_createPricing

ResponseAction1

Procedure Configur

Integration Procedure na

IP_configureProduct

Type

IPconfigure

Description

Step 7 - System Administrator can check if the permission set “IntelliConfigAdmin” is assigned on the profile.

Step 8 - System Administrator can edit custom metadata as mentioned below

- Go to setup
- Search for custom metadata “DynamicClassMethod”

All Custom Metadata Types

Custom metadata types enable you to create your own setup objects whose records are metadata rather than data. These are typically used to define application configurations that need to be environment to another, or packaged and installed.

Rather than building apps from data records in custom objects or custom settings, you can create custom metadata types and add metadata records, with all the manageability that comes with and upgrade. Querying custom metadata records doesn't count against SOQL limits.

New Custom Metadata Type							
Action	Label	Installed Package	Namespace Prefix	Visibility	API Name	Record Size	Description
Manage Records	CPO Group Member Type	Vlocity CMT	vlocity_cmt	Public	vlocity_cmt__CpqMemberType__mdt	1224	
Manage Records	DynamicClassMethod	IntelliConfig	IntelliConfig	Public	IntelliConfig__DynamicClassMethod__mdt	301	

3. Click on Manage Records -> Click on Label

DynamicClassMethod

View: All [Create New View](#)

New

Action	Label	DynamicClassMethod Name	Namespace Prefix
Edit	Class and Method Name	Class and Method Name	IntelliConfig

4. Notice the ClassName is “IntelliConfig.EPCInterfaceClass”

DynamicClassMethod

 This DynamicClassMethod is managed, meaning that you may only edit certain attributes. [Display More Information](#)

DynamicClassMethod Detail		Edit	Delete	Clone
Label	ClassandMethodName			Protected Component ☐
DynamicClassMethod Name	ClassandMethodName			Namespace Prefix IntelliConfig
ClassName	IntelliConfig.EPCInterfaceClass			
MethodName	productDecision			
Created By	Niranjana L. 6/21/2024, 12:21 AM			Last Modified By Niranjana L. 7/8/2024, 4:56 AM
		Edit	Delete	Clone

5. Click on Edit and replace the ClassName with “EPCInterfaceClass”

DynamicClassMethod (Managed)

 This DynamicClassMethod is managed, meaning that you may only edit certain attributes. [Display More Information](#)

DynamicClassMethod Detail		Edit	Clone	
Label	ClassandMethodName			Protected Component ☐
DynamicClassMethod Name	ClassandMethodName			Namespace Prefix IntelliConfig
ClassName	EPCInterfaceClass			
MethodName	productDecision			
Created By	Renuka Jyoti 7/8/2024, 4:19 AM			Last Modified By Renuka Jyoti 7/8/2024, 4:57 AM
		Edit	Clone	

PS:Vlocity Version Check

Check Vlocity CMT Package is earlier/lesser than 900.487.2 version then upgrade to 900.242.2 using below patch

For Production

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t5c0000017xbM>

For Sandbox

<https://test.salesforce.com/packaging/installPackage.apexp?p0=04t5c0000017xbM>

Then upgrade to the latest version using this link

https://help.salesforce.com/s/articleView?id=ind.comms_pre_upgrade_steps_winter_24.htm&type=5