



Teamcenter Configure & Quote - Installation and Setup Guide

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1. System Requirements

Before you begin the installation, ensure that your environment meets the following requirements:

Licenses and Accesses

Users must have the specified licenses and access permissions to utilize the full functionality.

- **Service Technician Access (STA) License**—Required for viewing data from Teamcenter.
- **Salesforce License**—Dependent on Service Cloud or Field Service.

User	Licenses
Siemens Technician	SLM for CRM (Basic)
Siemens Supervisor	SLM for CRM Asset Manager (Basic)

Version Compatibility Matrix

The following matrix shows the compatibility between versions of the Salesforce app and specific versions of Teamcenter. It is crucial to align these versions for proper functionality.

App Version	SLM-Microservice	Teamcenter
Teamcenter SLM 2606	2606 or latest patch	2606
	2512 or latest patch	2512
	2506 or latest patch	2506
	2412.0001 or latest patch	2412
	2406.0002 or latest patch	2406
	2312.0005 or latest patch	2312

Note

Ensure you use the corresponding SLM Microservice (SLM-MS) and Teamcenter (TC) or Active Workspace (AW) version based on the Salesforce app version you are installing.

2. App Installation and Configuration

Prerequisites

Before proceeding with the installation, ensure that you meet the following prerequisites:

1. You have installed and configured the **Teamcenter Service Lifecycle for SFDC** base package from **Salesforce AppExchange**.
2. You have installed **Teamcenter** and the respective **SLM microservices**.
3. Your Teamcenter environment is exposed to connect with Salesforce.

Install the RLM (Teamcenter Configure & Quote) extension package

Procedure

1. Before moving ahead with the configuration, you need to first install the extension package for Teamcenter Configure & Quote.
2. On the **Install** page, choose **Install for All Users**, select the acknowledgement checkbox, and then click **Install**.

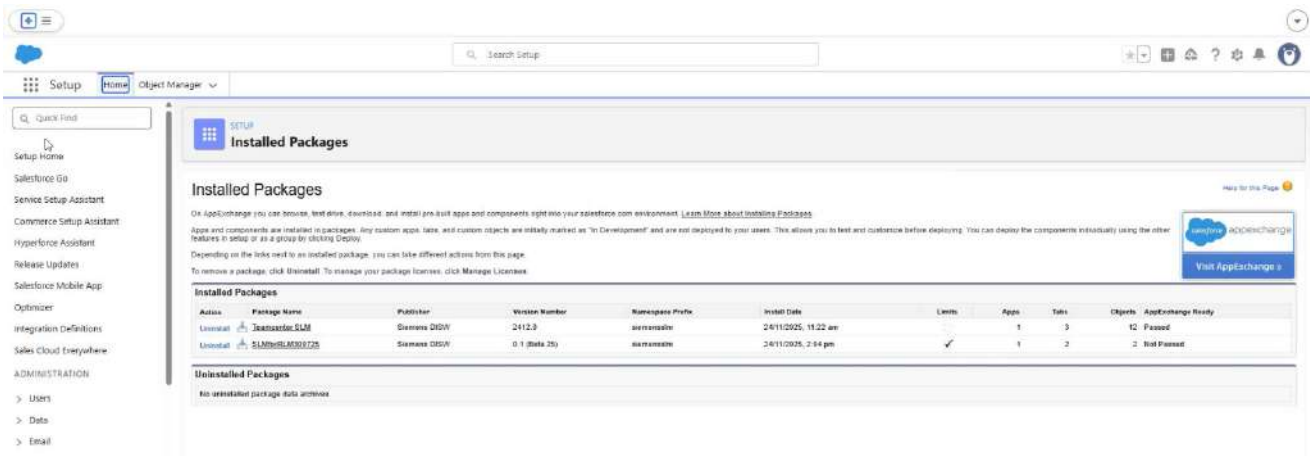


The installation process begins.

3. After the installation is complete, click **Done**. You will see the list of installed packages.



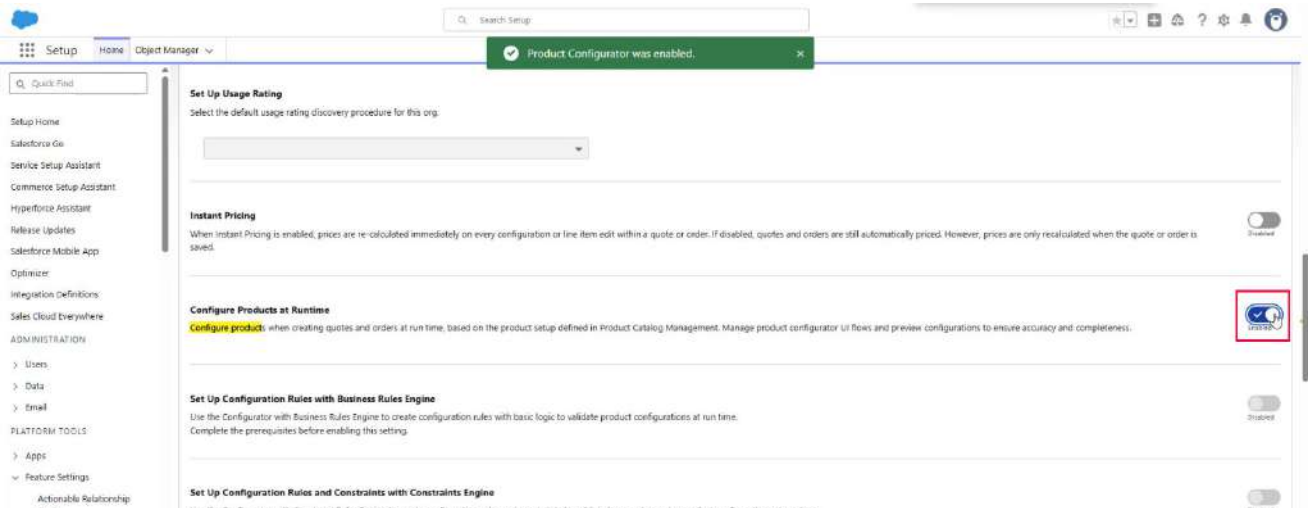
Tip
You can also find the **Installed Packages** page in the **Setup** menu.



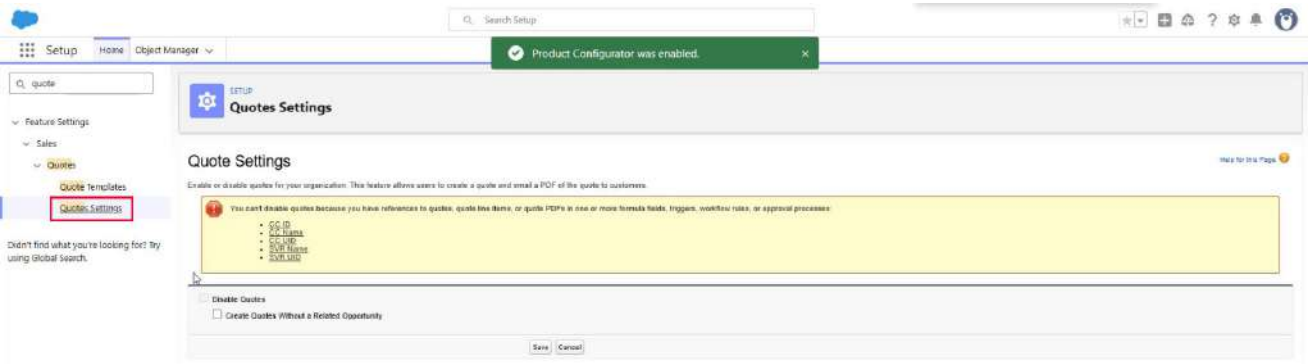
Configure Salesforce revenue, quotes, and order settings

Procedure

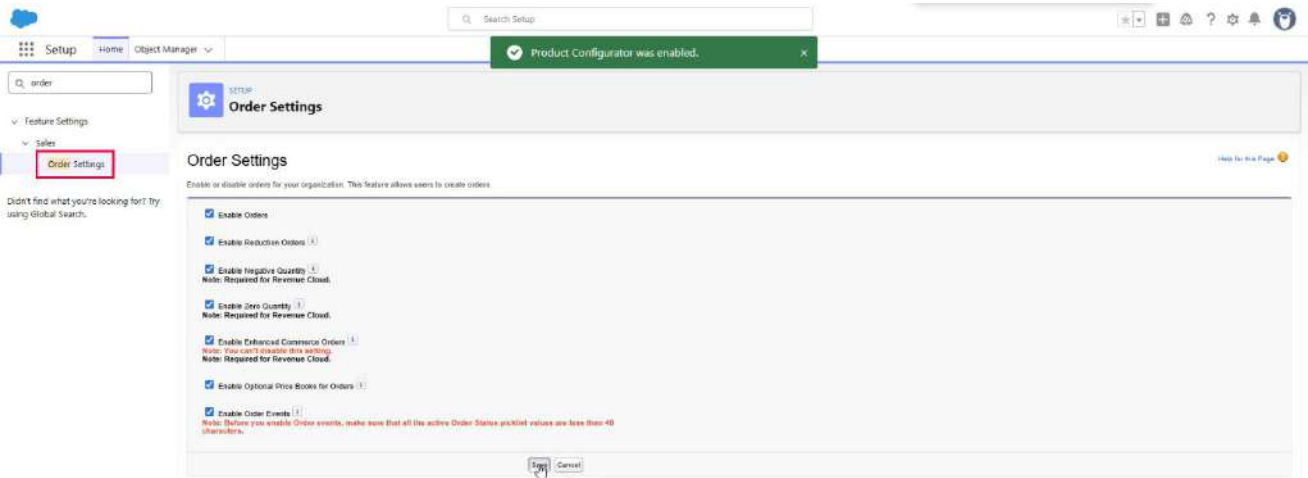
1. Open the **Revenue Settings** page and enable the **Configure Products Runtime** option.



2. Open the **Quotes Settings** page and ensure that the setting is enabled.



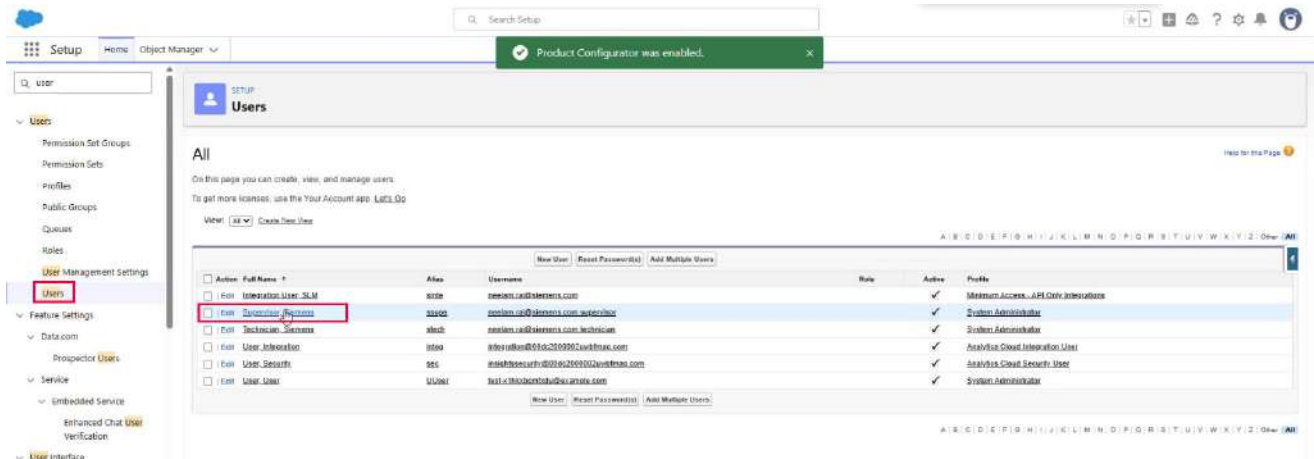
3. Open the **Order Settings** page, select all the checkboxes, and click Save.



Assign Permission Sets and Licenses for supervisor user

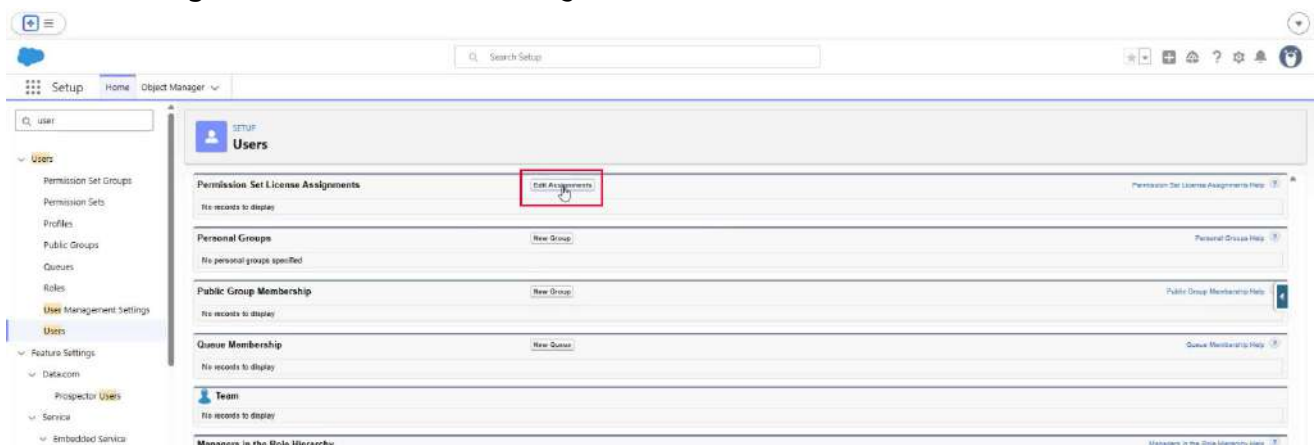
Procedure

1. On the **Users** page, open the **Supervisor** user by clicking on their full name.



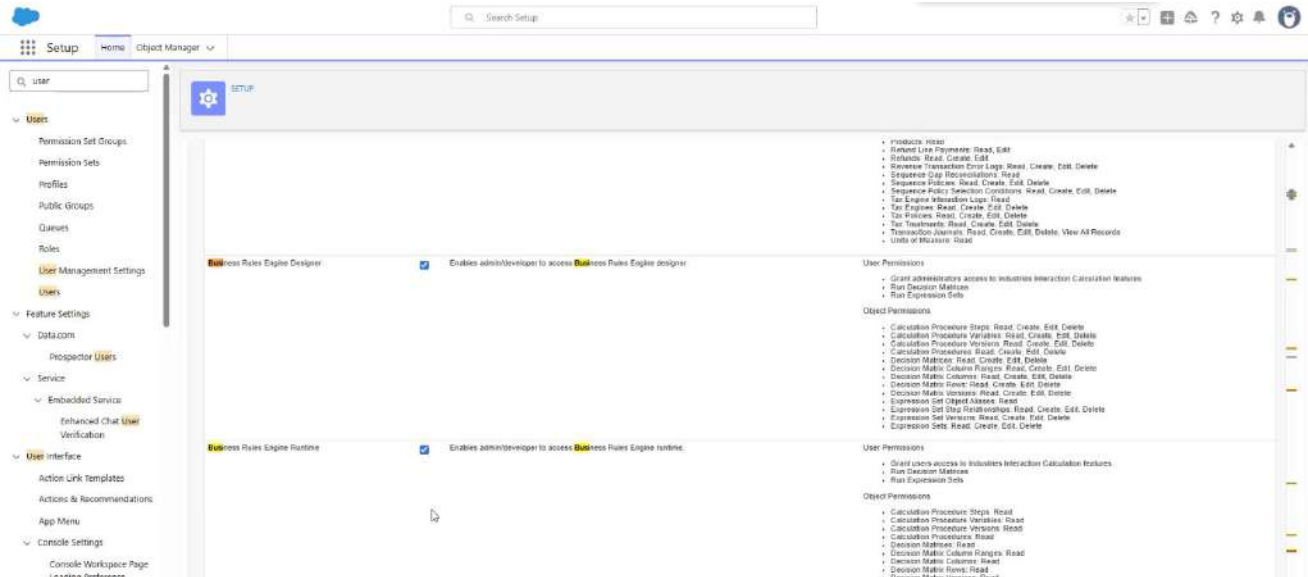
The user details open.

2. Click **Permission Set License Assignments** to view the permission set license details.
3. Click **Edit Assignments**, select the following checkboxes, and click **Save**.

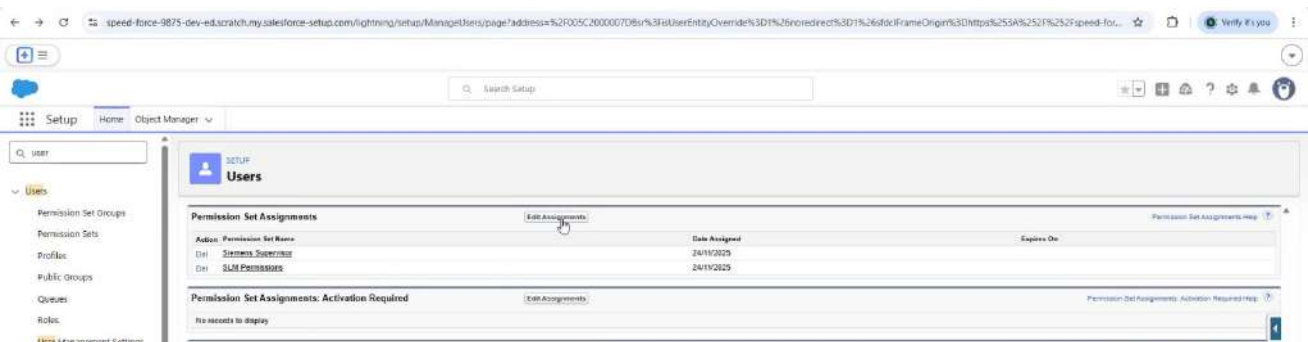


- Business Rules Engine Designer
- Business Rules Engine Runtime
- Contract Lifecycle Management User
- Product Catalog Management Administrator
- Product Catalog Management Viewer
- Product Configuration User
- Product Discovery User
- Revenue Cloud User

- Salesforce Pricing Design Time
- Salesforce Pricing Design Run Time

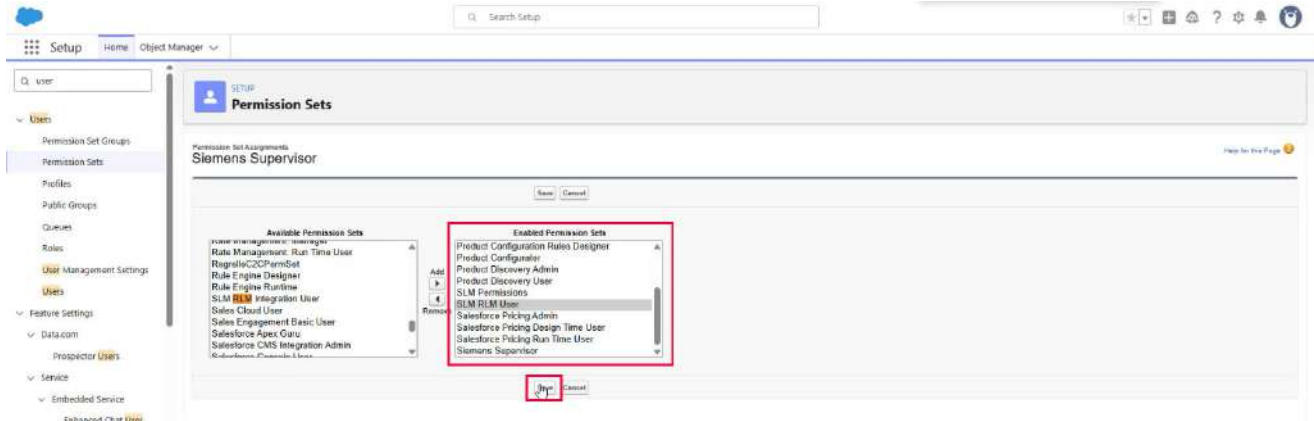


4. Click **Permission Set Assignment** to open the permission set details.
5. Click **Edit Assignments** on the **Permission Set** page, add the following permission sets, and click **Save**.



- Salesforce Pricing Admin
- Salesforce Pricing Design Time User
- Salesforce Pricing Run Time User
- Product Discovery Admin
- Product Discovery User
- Price and Tax Calculation for Quoting
- PlaceOrder API
- Product Configuration Rules Designer
- Product Catalog Management Viewer
- Product Catalog Management Designer

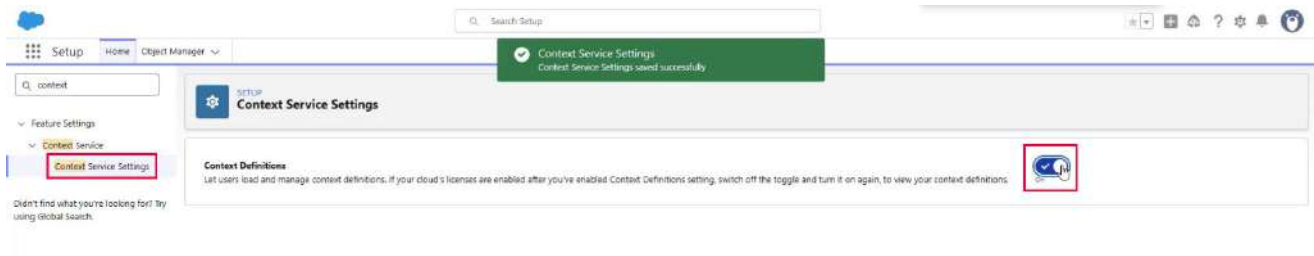
- Create Orders from Quotes
- Product Configurator
- Assetize Order
- SLM RLM User



Enable context service and Salesforce pricing

Procedure

1. Open the **Context Service Settings** page and enable the **Context Definitions**.



2. Open the **Salesforce Pricing Settings** page and enable **Salesforce pricing**.



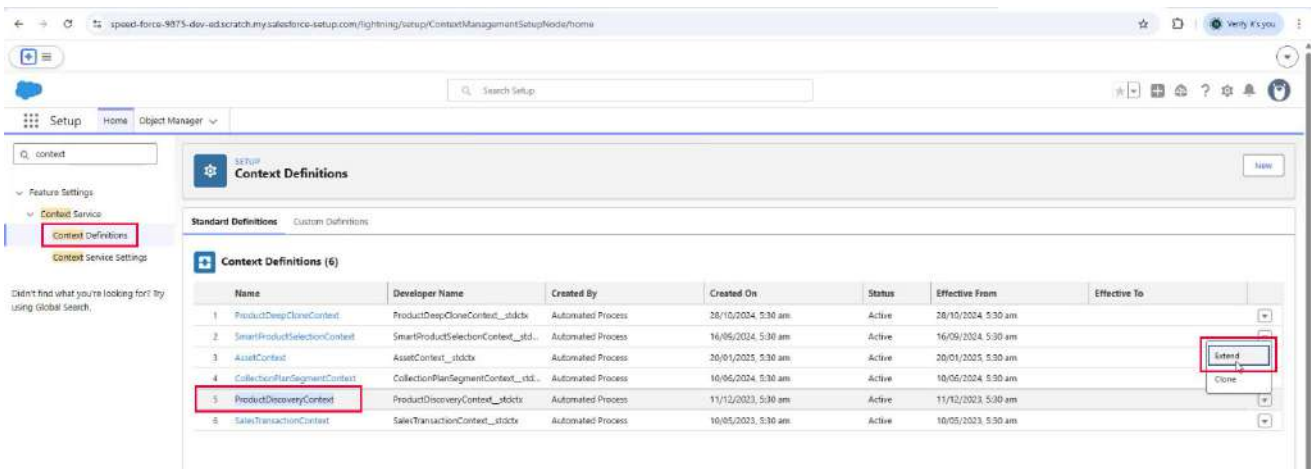
Note

Refresh the page if you do not see the Salesforce Pricing setting.

Extend and map product discovery context

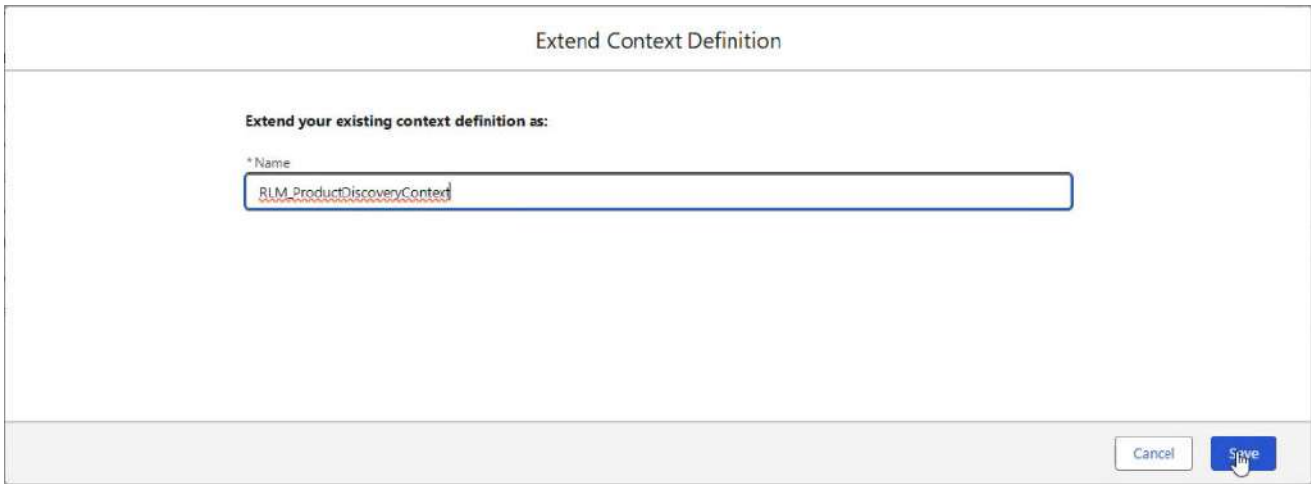
Procedure

- 1. Open the **Context Definitions** page.
- 2. From the **Context Definitions** list, for **ProductDiscoveryContext**, select **Extend** from the drop-down list.

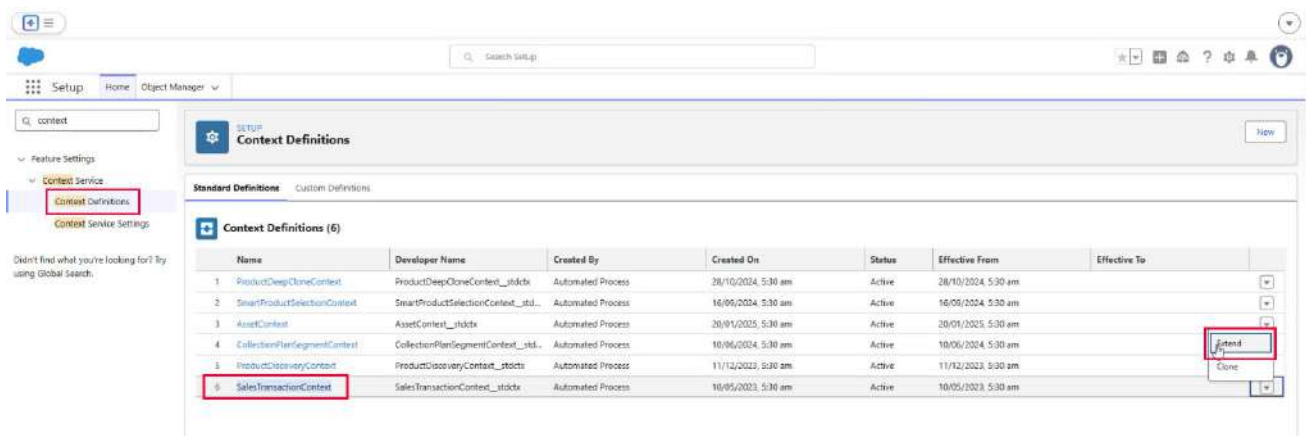


The **Extend Context Definition** dialog box opens.

- 3. In the **Extend Context Definition** dialog box, enter the name as **RLM_ProductDiscoveryContext**, and click **Save**.

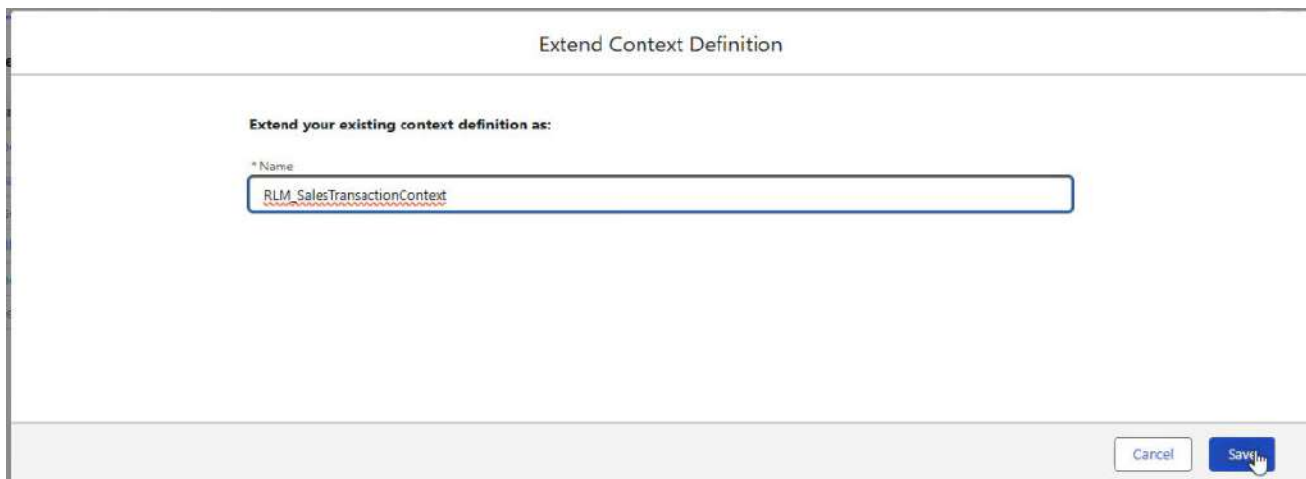


- 4. Again, from the **Context Definitions** list, for **SalesTransactionContext**, select **Extend** from the drop-down list.

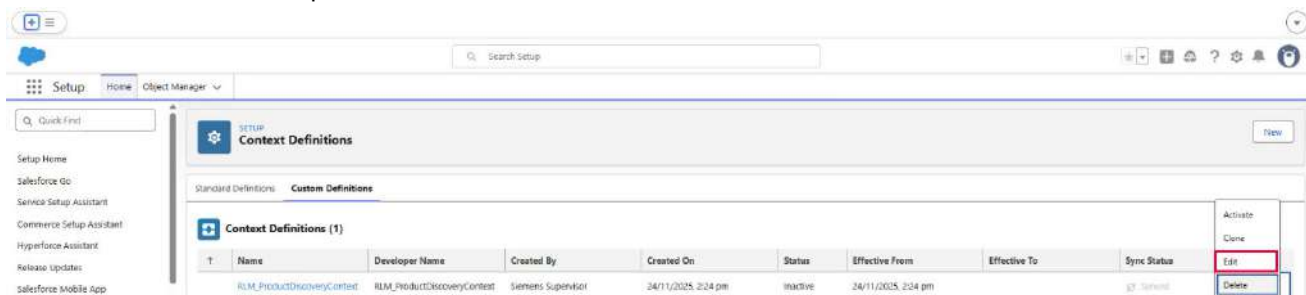


The **Extend Context Definition** dialog box opens.

5. In the **Extend Context Definition** dialog box, enter the name as **RLM_SalesTransactionContext**, and click **Save**.



6. You can now navigate to the **Customs Definitions** tab, and for **RLM_ProductDiscoveryContext**, select **Edit** from the drop-down list.



The **Edit Context Definition** dialog box opens.

7. In the **Edit Context Definition** dialog box, set the **Effective From Date** and click **Next**.

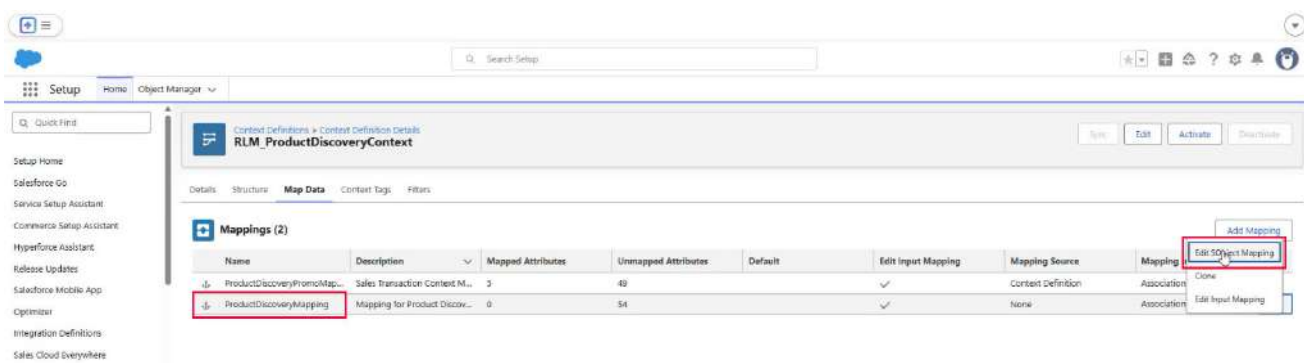
8. Click **Next** until you reach the **Edit Attribute Tags** page.

Note

You do not need to make any changes on the Edit Structure page and the Edit Attribute page, so click Next on these pages.

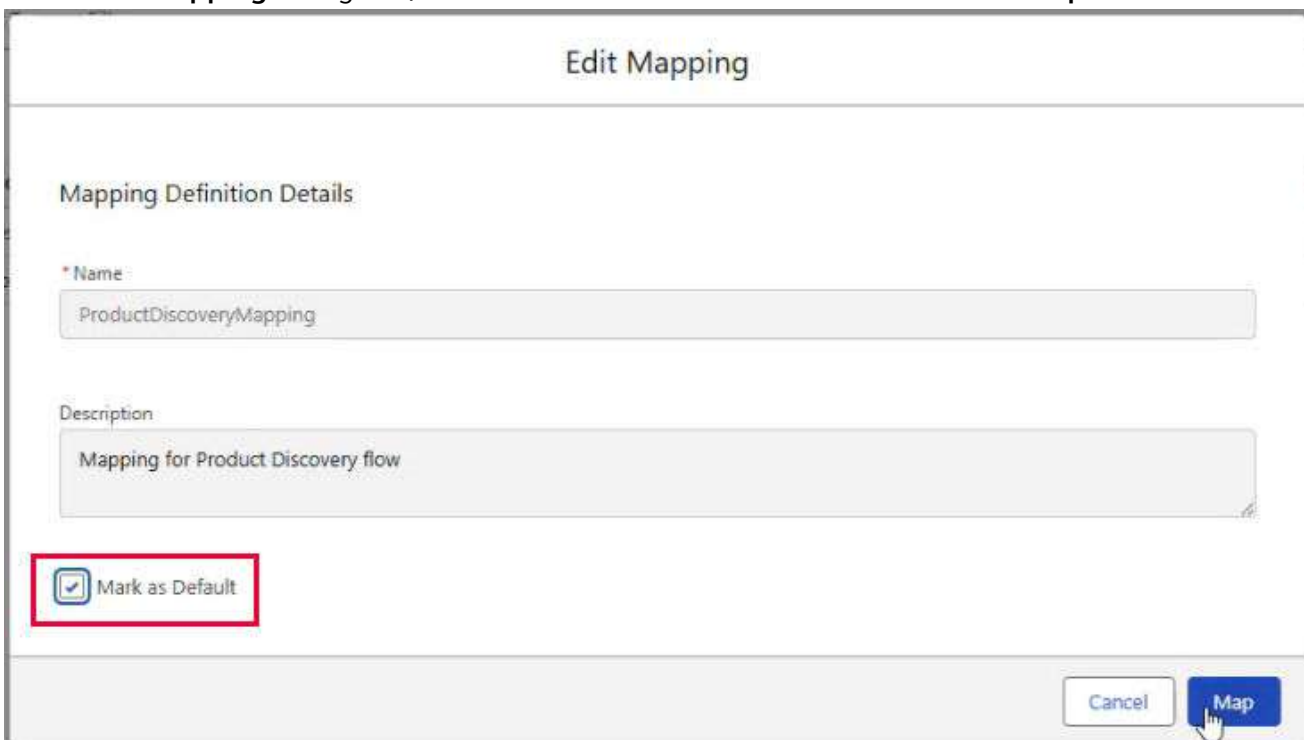
9. On the **Edit Attribute Tags** page, click **Save**.

10. From the **Context Definitions** list, select **RLM_ProductDiscoveryContext** and go to the **Map Data** tab.
11. In the **Map Data** tab, for **ProductDiscoveryMapping**, select **Edit SObject Mapping** from the drop-down list.

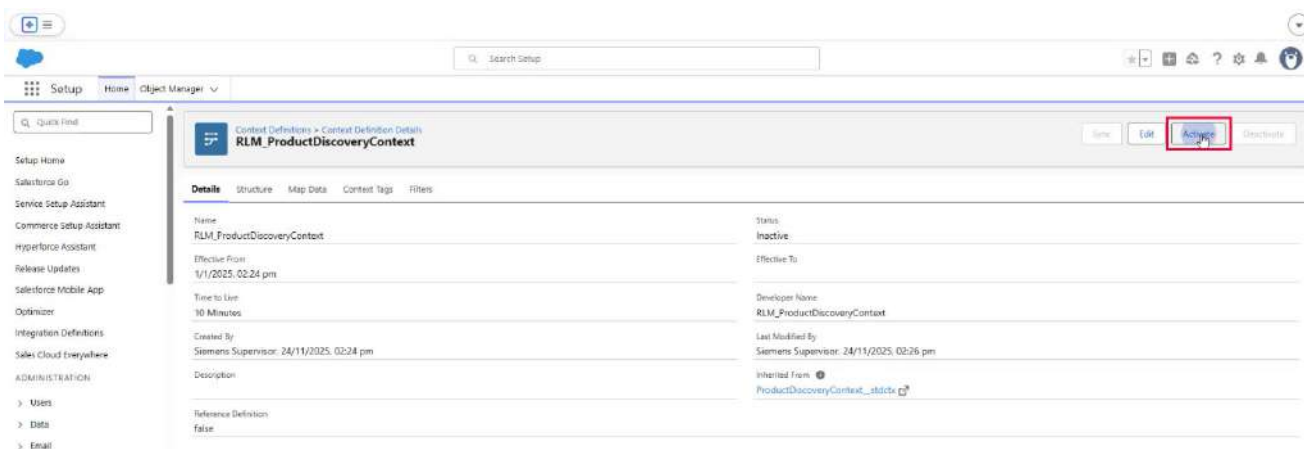


The **Edit Mapping** dialog box opens.

12. In the **Edit Mapping** dialog box, select the **Mark as Default** checkbox and click **Map**.



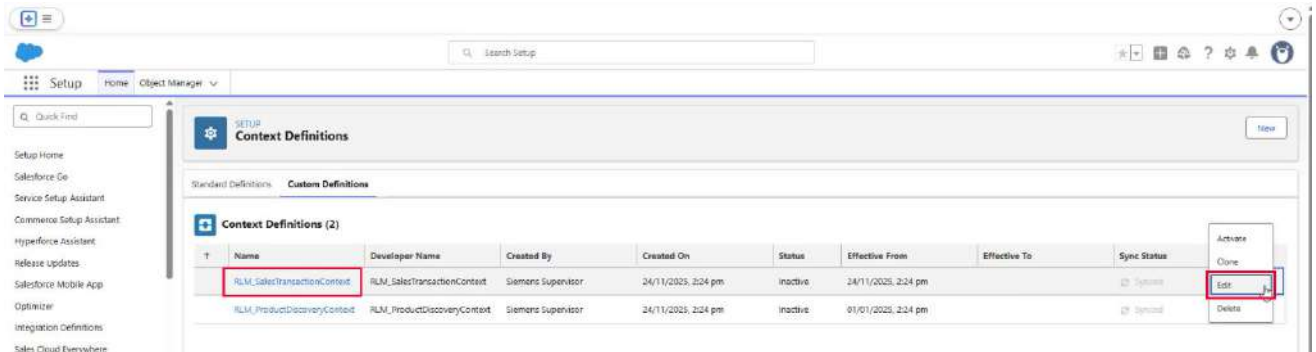
13. Click **Activate**.



Extend and map sales transaction context

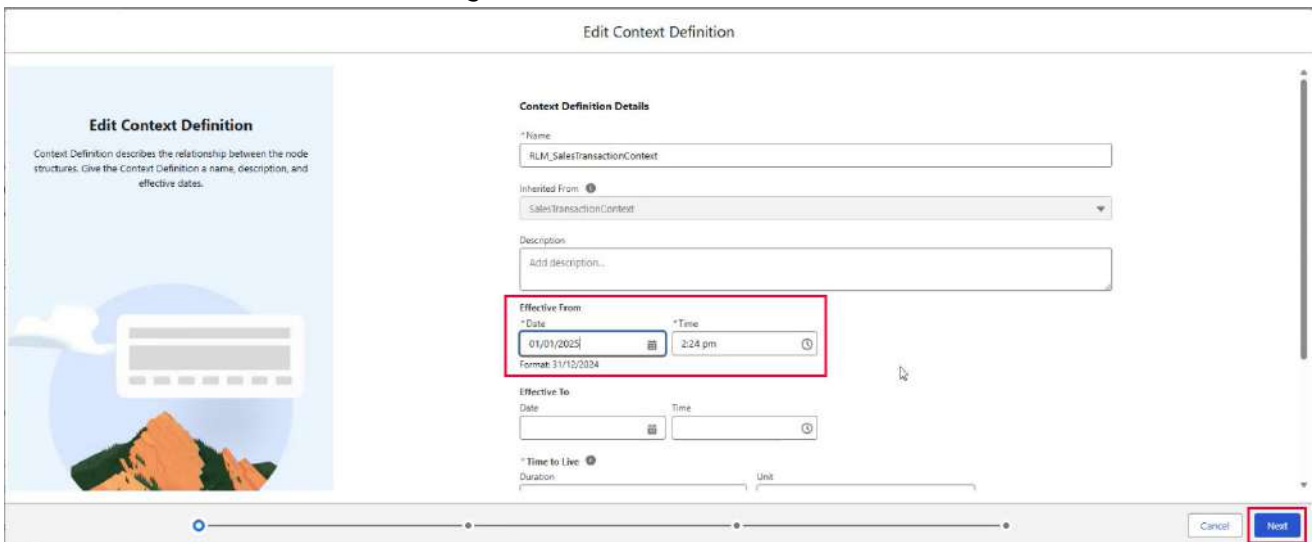
Procedure

1. Go back to the **Content Definitions** page and then to the **Customs Definitions** tab.
2. From the **Context Definitions** list, for **SalesTransactionContext**, select **Edit** from the drop-down list.



The **Edit Context Definition** dialog box opens.

3. In the **Edit Context Definition** dialog box, set the **Effective From Date** and click **Next**.

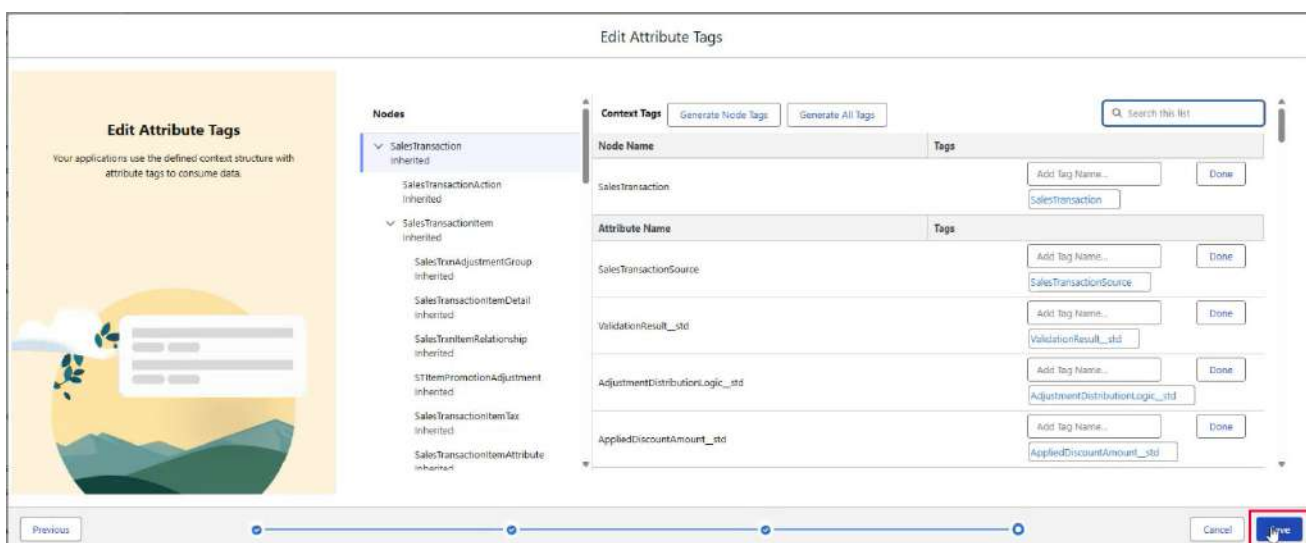


4. Click **Next** until you reach the **Edit Attribute Tags** page.

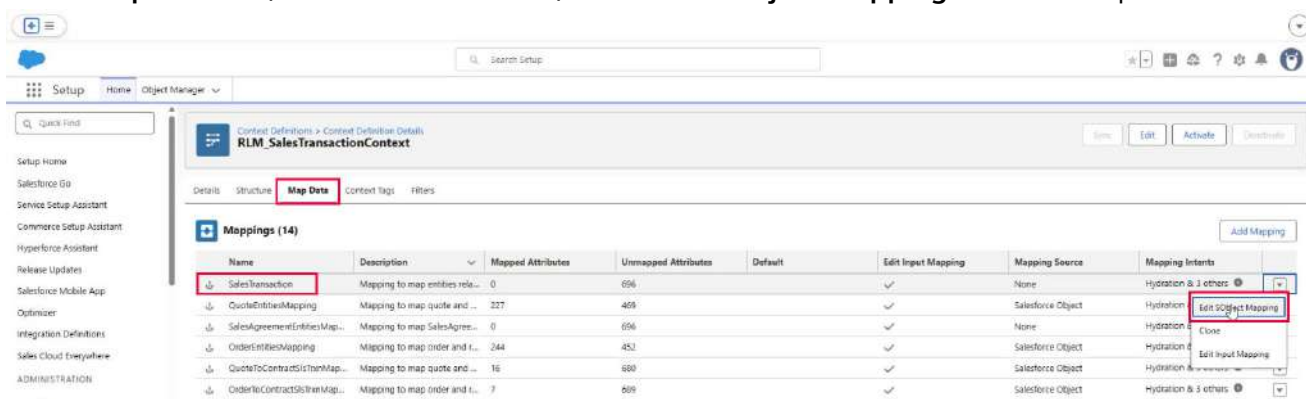
Note

You do not need to make any changes on the Edit Structure page and the Edit Attribute page, so click Next on these pages.

5. On the **Edit Attribute Tags** page, click **Save**.



6. From the **Context Definitions** list, select **RLM_SalesTransactionContext** and go to the **Map Data** tab.
7. In the **Map Data** tab, for **SalesTransaction**, select **Edit Object Mapping** from the drop-down list.



The **Edit Mapping** dialog box opens.

8. In the **Edit Mapping** dialog box, select the **Mark as Default** checkbox and click **Map** to save the changes.

Edit Mapping

Mapping Definition Details

* Name
SalesTransaction

Description
Mapping to map entities related to pricing elements

Mark as Default

Cancel Map

9. Click **Activate**.

Context Definitions > Context Definition Details
RLM_SalesTransactionContext

Details Structure **Map Data** Context Tags Filters

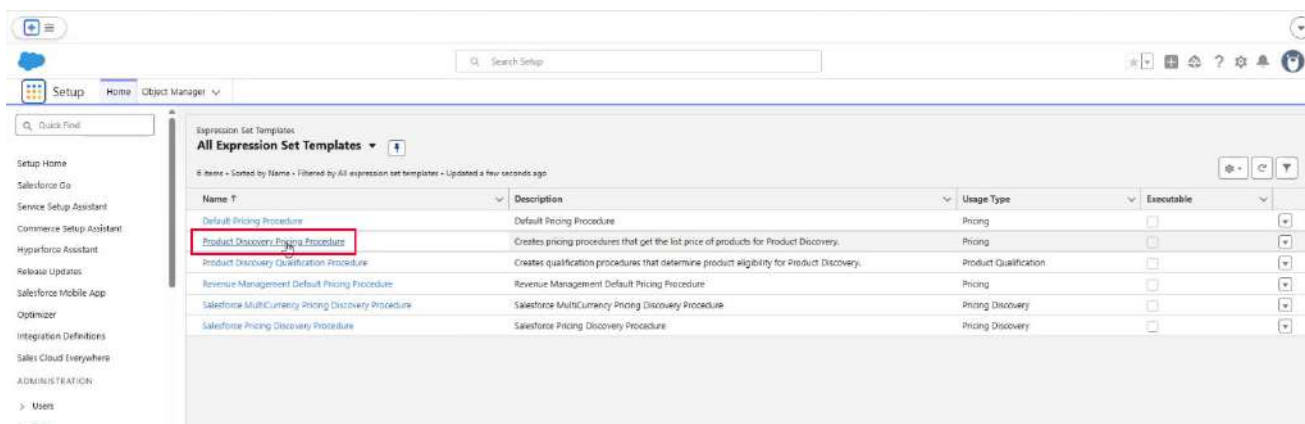
Mappings (14)

Name	Description	Mapped Attributes	Unmapped Attributes	Default	Edit Input Mapping	Mapping Source	Mapping Intents
SalesTransaction	Mapping to map entities related to pricing elements	0	696	✓	✓	None	Hydration & 3 others
QuoteEntityMapping	Mapping to map quote and ...	227	469		✓	Salesforce Object	Hydration & 3 others
SalesAgreementEntityMapping	Mapping to map SalesAgree...	0	696		✓	None	Hydration & 3 others
OrderEntityMapping	Mapping to map order and r...	344	452		✓	Salesforce Object	Hydration & 3 others
QuoteToContractEntityMapping	Mapping to map quote and ...	16	680		✓	Salesforce Object	Hydration & 3 others

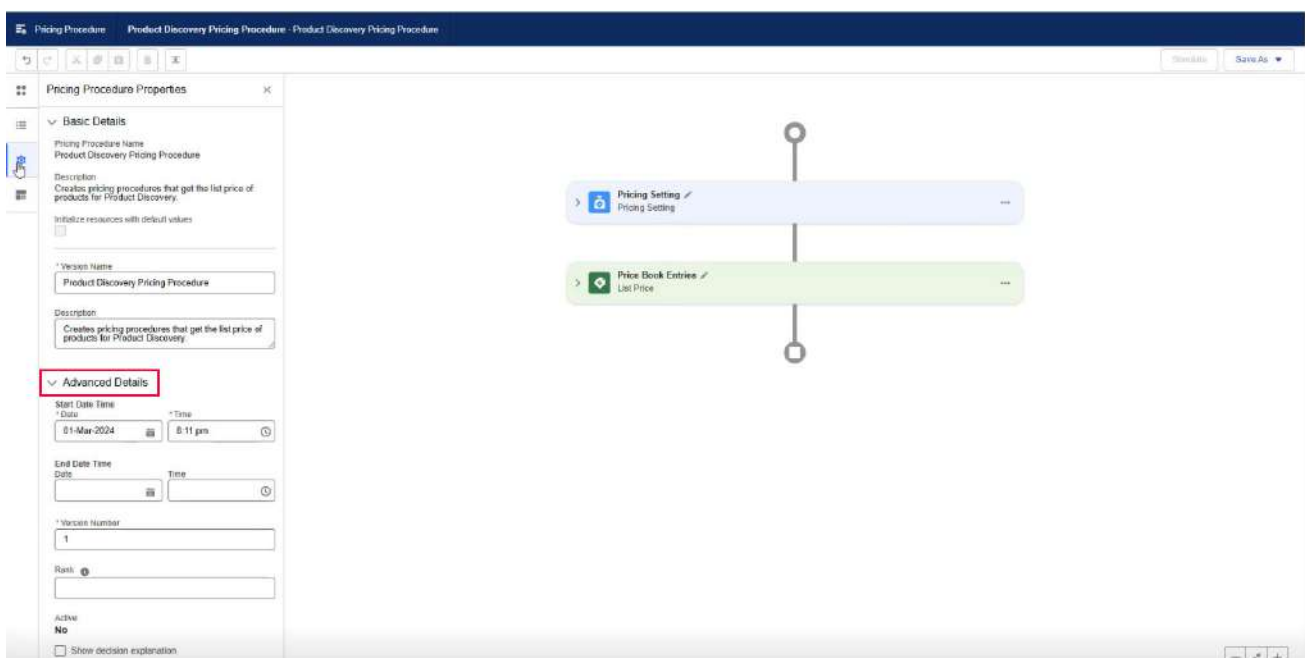
Configure expression set templates and pricing procedures

Procedure

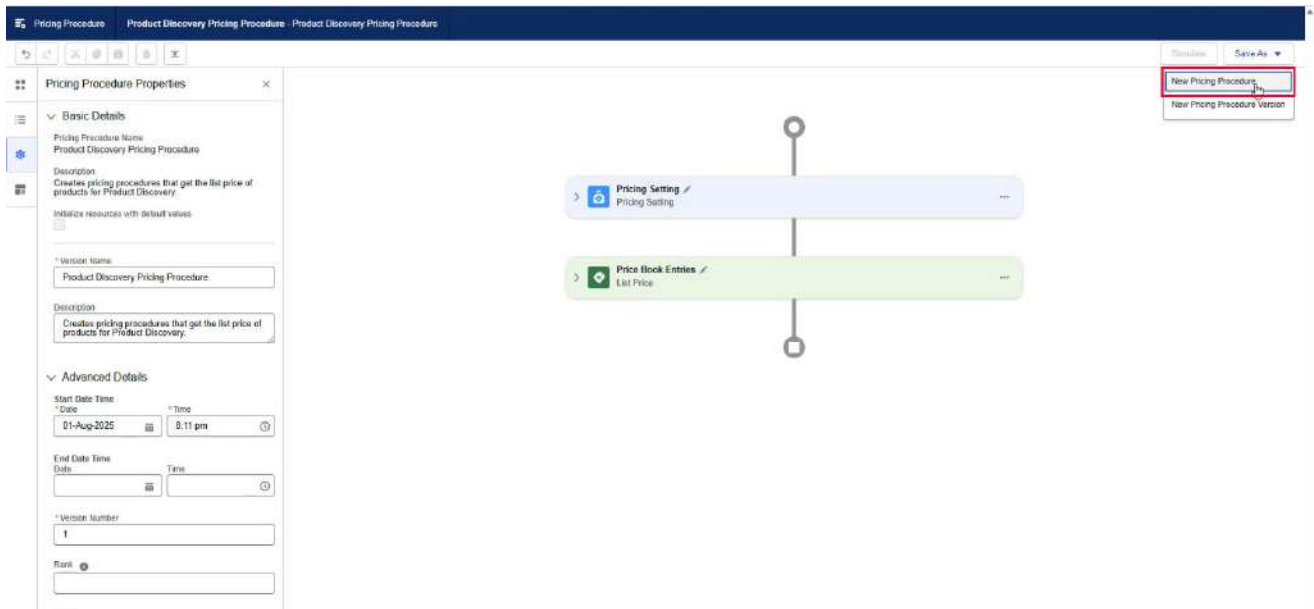
1. After the **Context Definitions** are set, go to **Expression Set Templates** and open **Product Discovery Pricing Procedure**.



- On the **Pricing Procedure** page, click **Settings**.
The **Pricing Procedure Properties** panel opens.
- In the **Pricing Procedure Properties** panel, go to the **Advanced Details** section and set the **Start Date**.



- Choose **Save As→New Pricing Procedure**.



5. In the **New Pricing Procedure** dialog box, add **Rank** as 1, and then click **Save**.

New Pricing Procedure

Pricing Procedure Details

* Pricing Procedure Name

Usage Type

Context Definition

☐ Initialize resources with default values ⓘ

Pricing Procedure Version Details

Rank
 ⓘ

☐ Active

Description

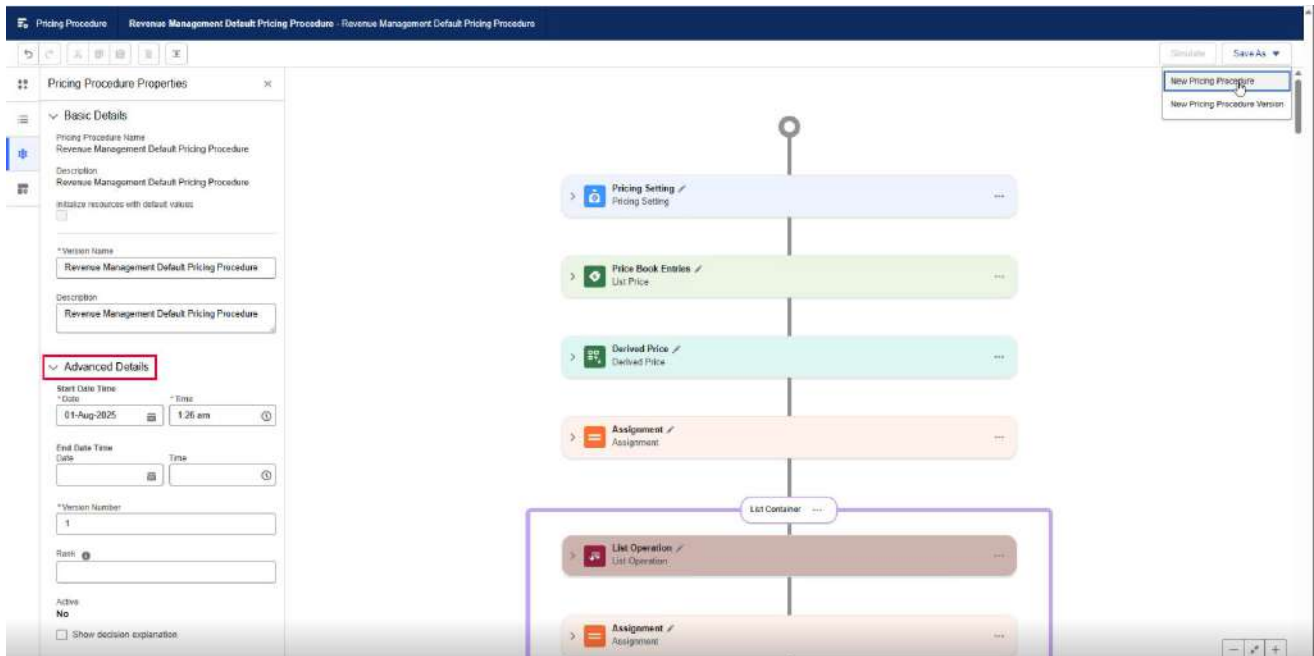
- Return to **Expression Set Templates** and click **Revenue Management Default Pricing Procedure**.

Expression Set Templates
All Expression Set Templates ⓘ

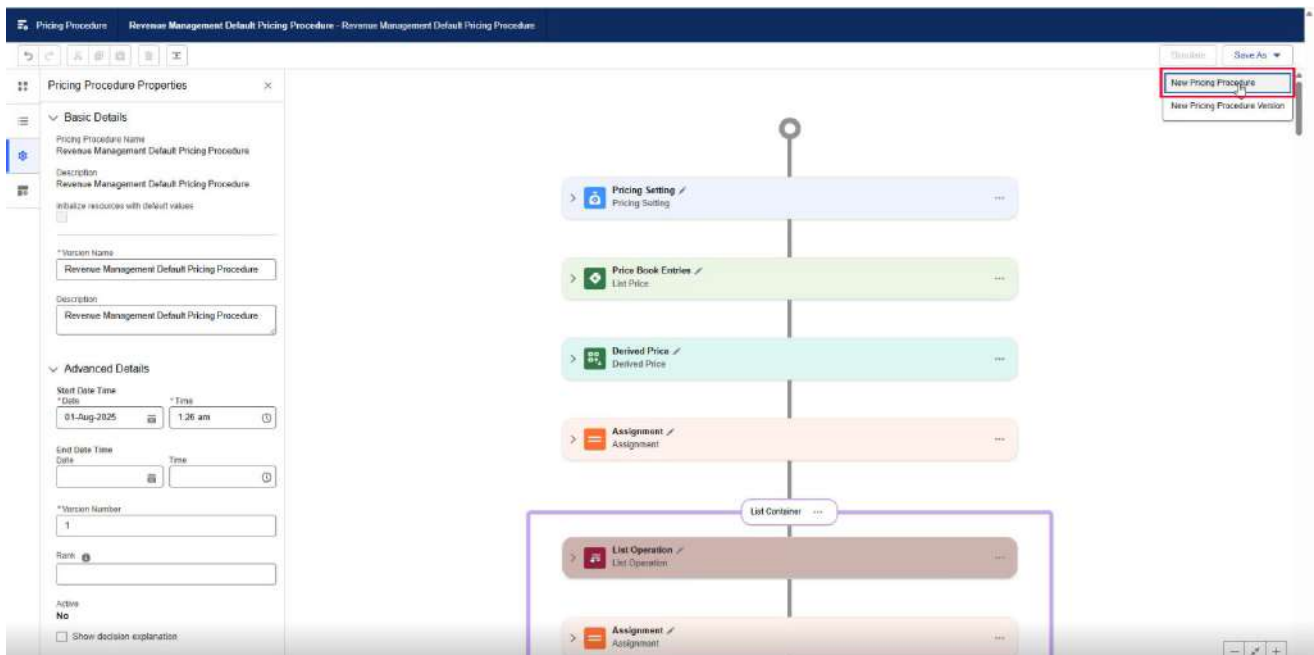
6 items • Sorted by Name • Filtered by All expression set templates • Updated 2 minutes ago

Name ↑	Description	Usage Type	Executable
Default Pricing Procedure	Default Pricing Procedure	Pricing	☐
Product Discovery Pricing Procedure	Creates pricing procedures that get the list price of products for Product Discovery.	Pricing	☐
Product Discovery Qualification Procedure	Creates qualification procedures that determine product eligibility for Product Discovery.	Product Qualification	☐
Revenue Management Default Pricing Procedure	Revenue Management Default Pricing Procedure	Pricing	☐
Salesforce MultiCurrency Pricing Discovery Procedure	Salesforce MultiCurrency Pricing Discovery Procedure	Pricing Discovery	☐
Salesforce Pricing Discovery Procedure	Salesforce Pricing Discovery Procedure	Pricing Discovery	☐

- On the **Pricing Procedure** page, click **Settings**.
The **Pricing Procedure Properties** panel opens.
- In the **Pricing Procedure Properties** panel, go to the **Advanced Details** section and set the **Start Date**.



9. Choose **Save As**→**New Pricing Procedure**.



10. In the **New Pricing Procedure** dialog box, add **Rank** as 1, and then click **Save**.

New Pricing Procedure

Pricing Procedure Details

* Pricing Procedure Name
Revenue Management Default Pricing Procedure

Usage Type
Pricing

Context Definition
SalesTransactionContext__stdctx

☐ Initialize resources with default values

Pricing Procedure Version Details

Rank
1

☐ Active

Description
Revenue Management Default Pricing Procedure

Saving...

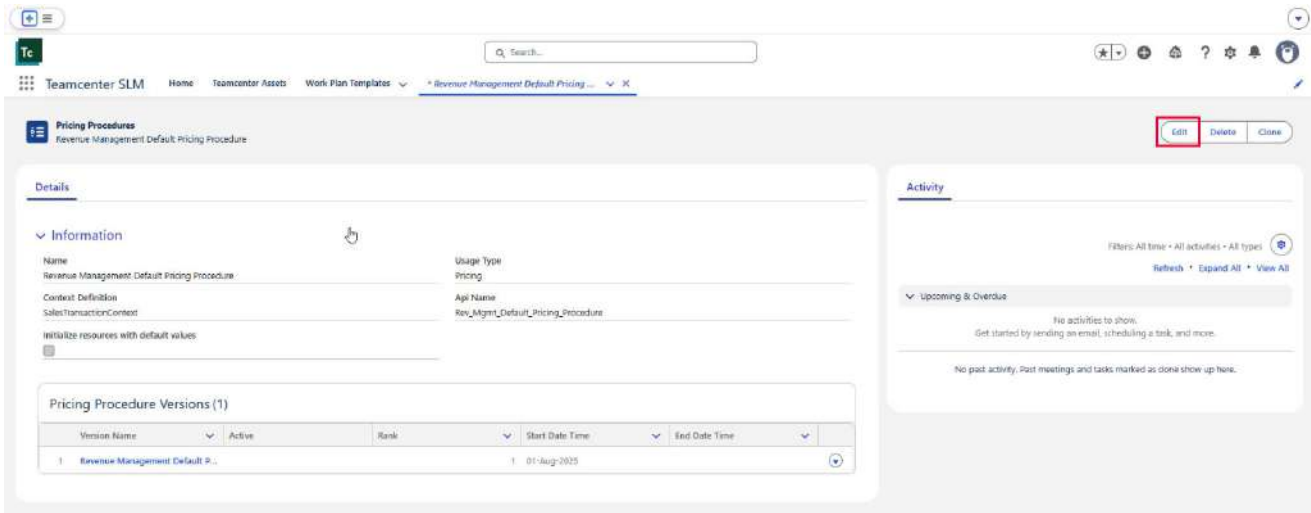
Execute pricing procedures with context definitions

Procedure

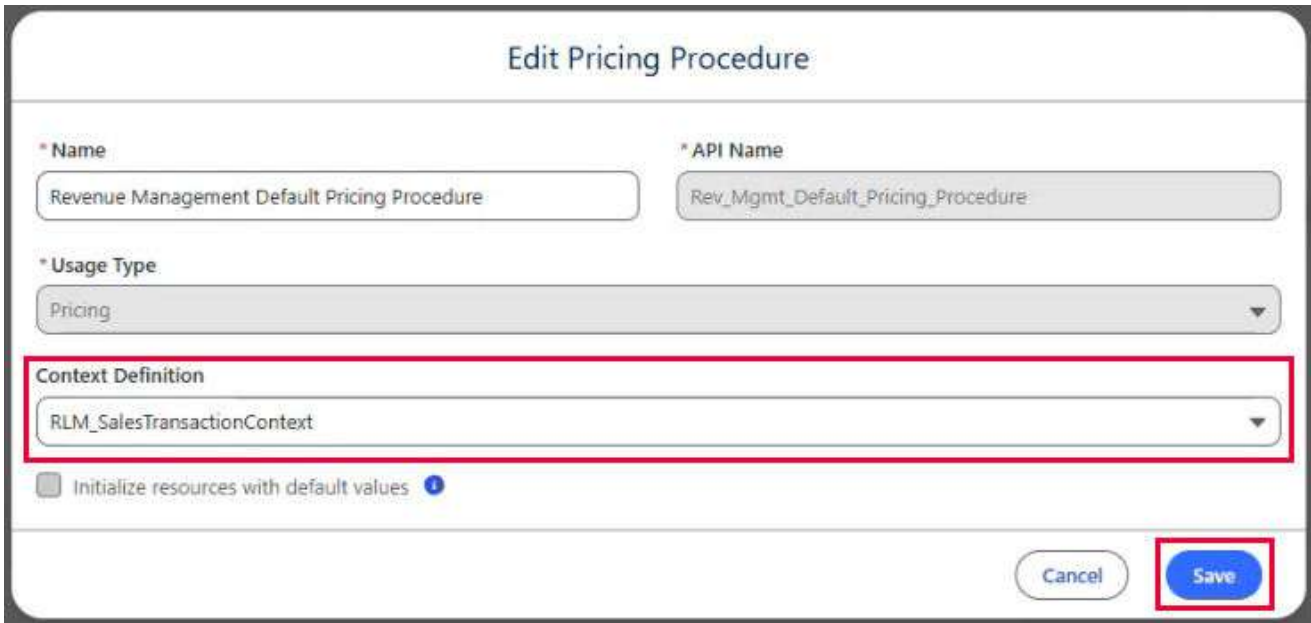
1. On the **Pricing Procedure** page, open **Revenue Management Default Pricing Procedure**.

Name	API Name	Created By	Usage Type
1 Revenue Management Default Pricing Procedure	Rev_Mgmt_Default_Pricing_Procedure	scupe	Pricing
2 Product Discovery Pricing Procedure	Product_Discovery_Pricing_Procedure	scupe	Pricing

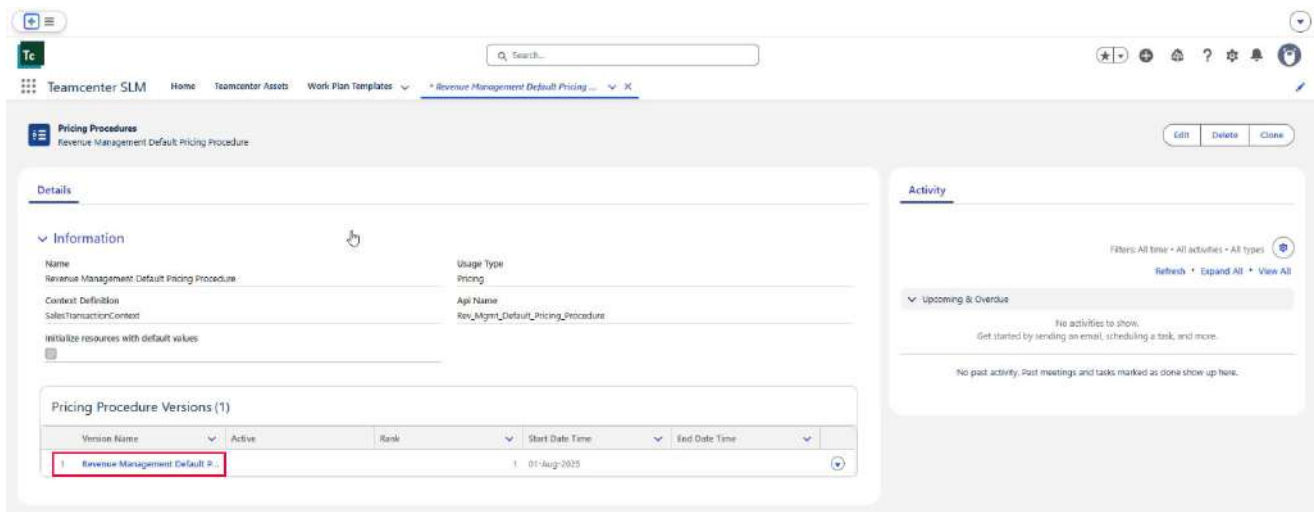
2. Click **Edit**.



3. In the **Edit Pricing Procedure** dialog box, from the **Context Definition** list, select **RLM_SalesTransactionContext**. Click **Save**.



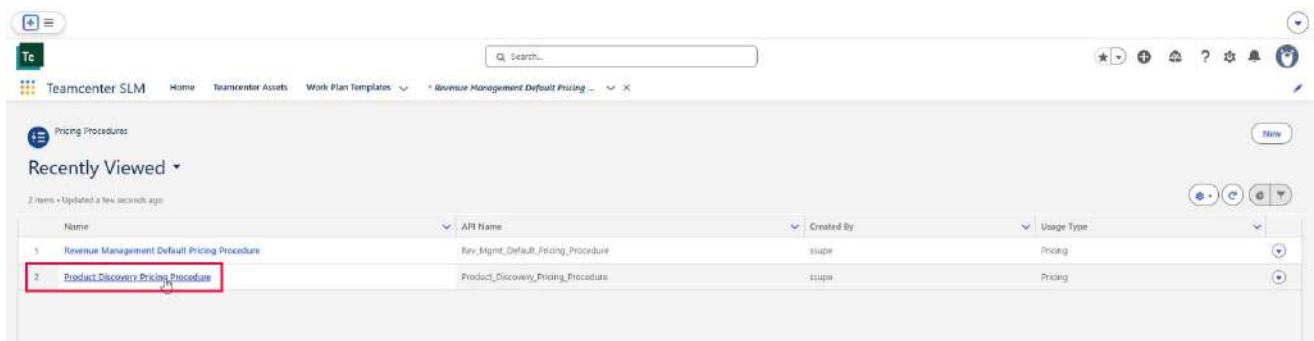
4. On the **Pricing Procedure** page, under **Pricing Procedure Versions** table, click **Revenue Management Default Pricing Procedure**.



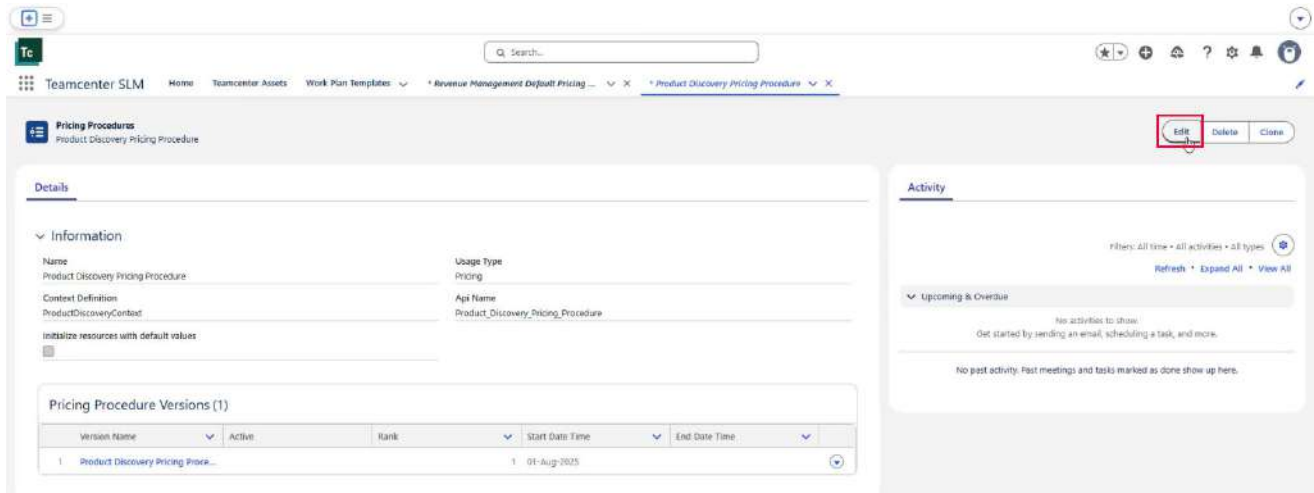
5. Click **Activate**.



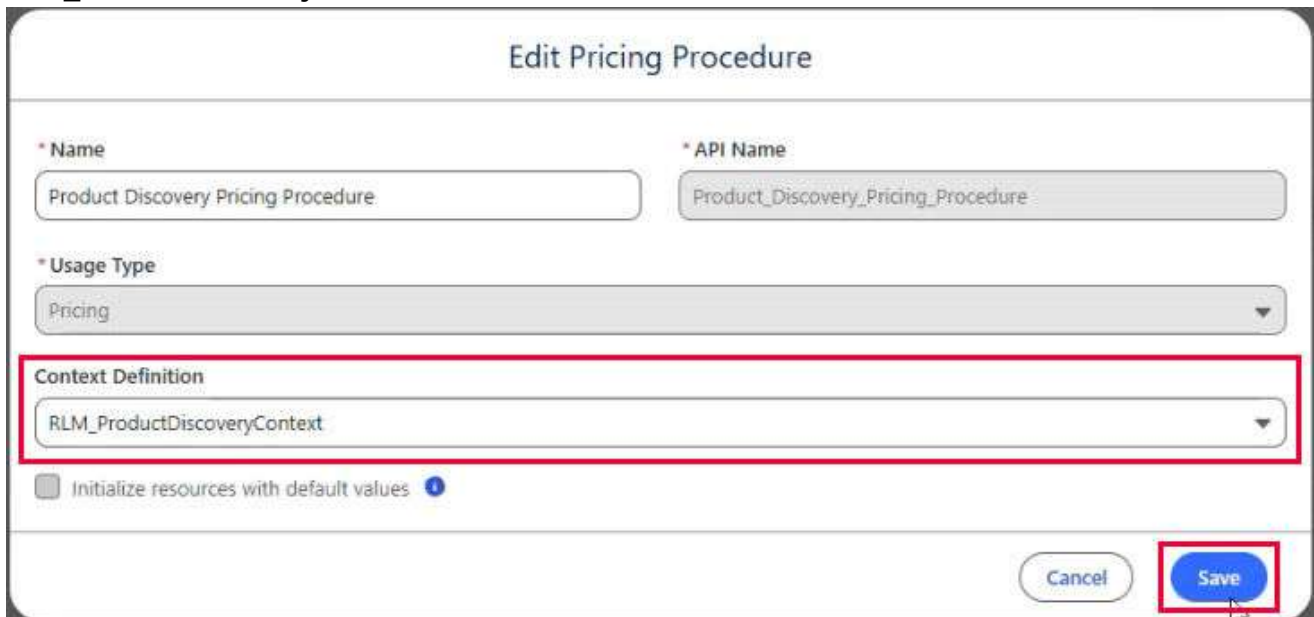
6. Again, return to the Pricing Procedure page and open **Product Discovery Pricing Procedure**.



7. Click **Edit**.

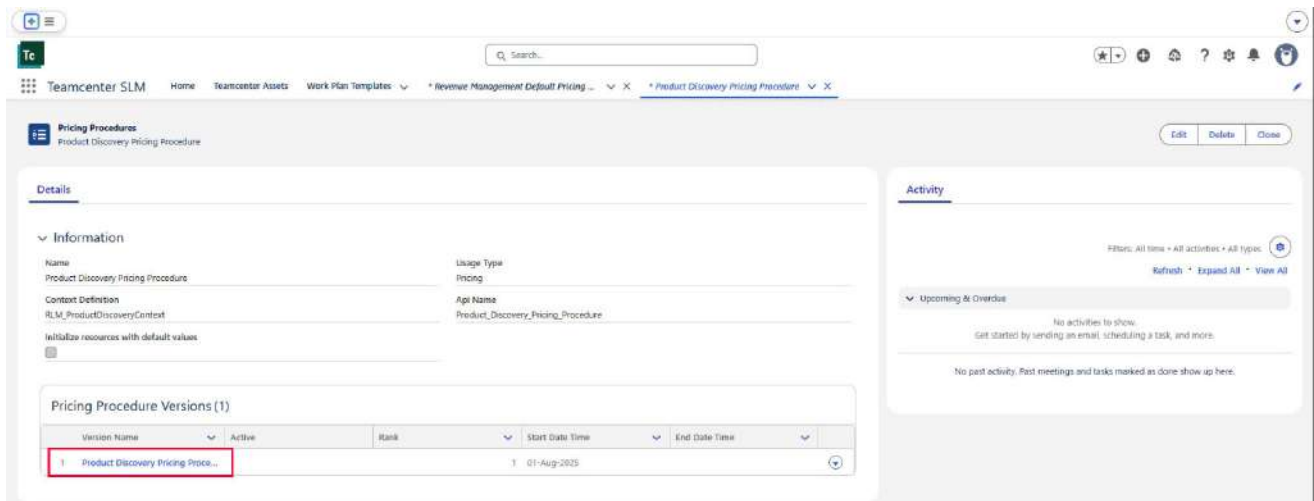


8. In the **Edit Pricing Procedure** dialog box, from the **Context Definition** list, select **RLM_ProductDiscoveryContext**. Click **Save**.

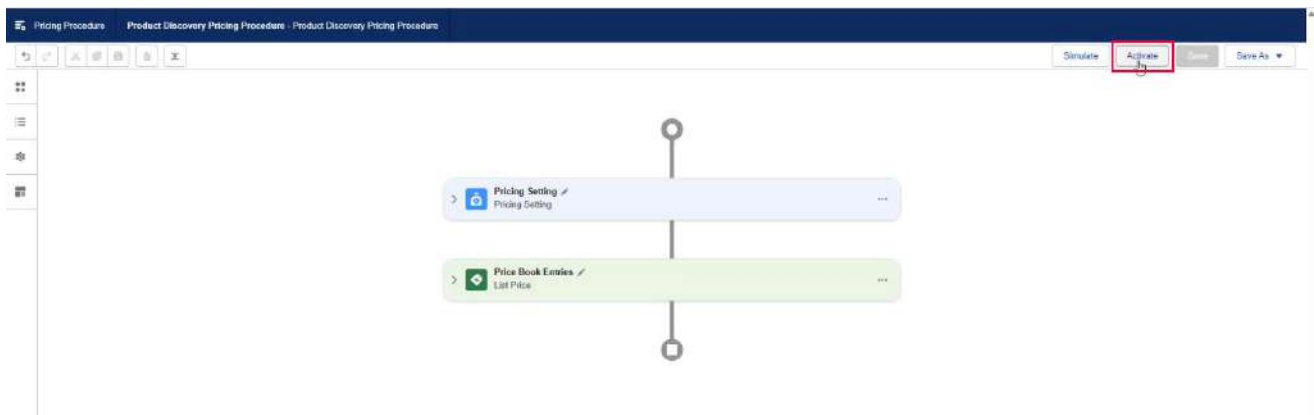


9. On the **Pricing Procedure** page, under **Pricing Procedure Versions** table, click **Product Discovery Pricing Procedure**.

Finalize Salesforce pricing and product discovery settings



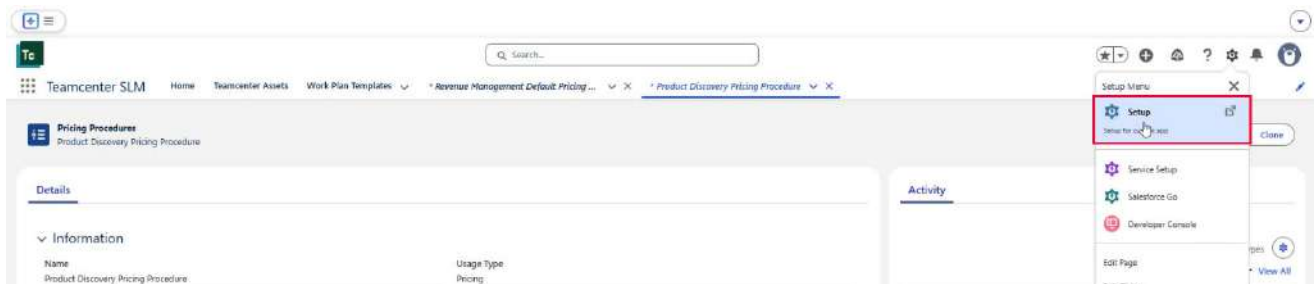
10. Click **Activate**.



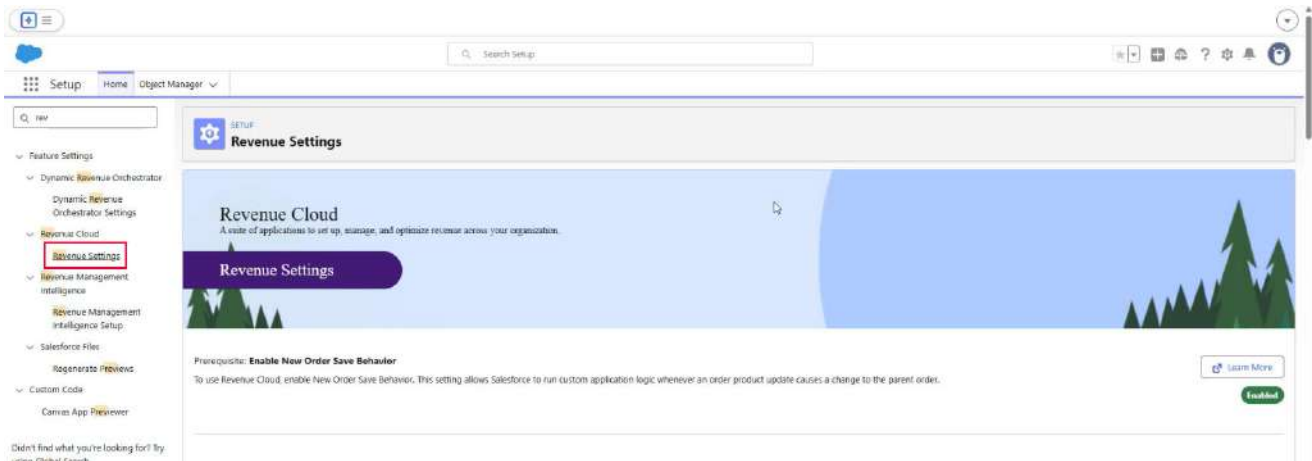
Finalize Salesforce pricing and product discovery settings

Procedure

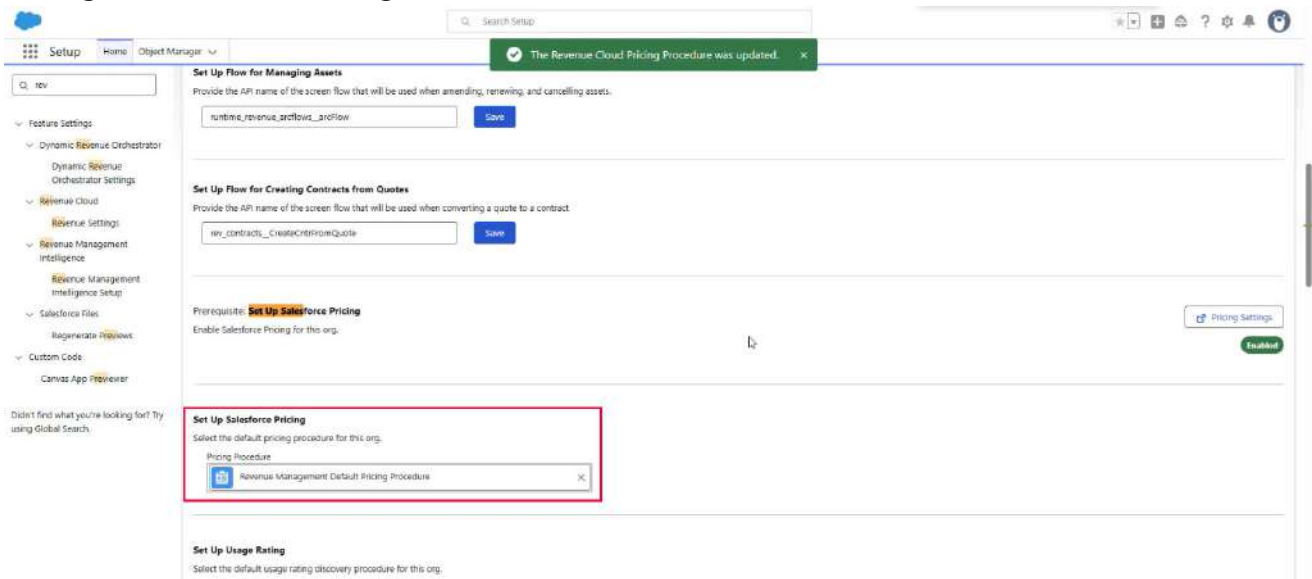
1. Go to the Salesforce home page and choose **Settings**→**Setup**.



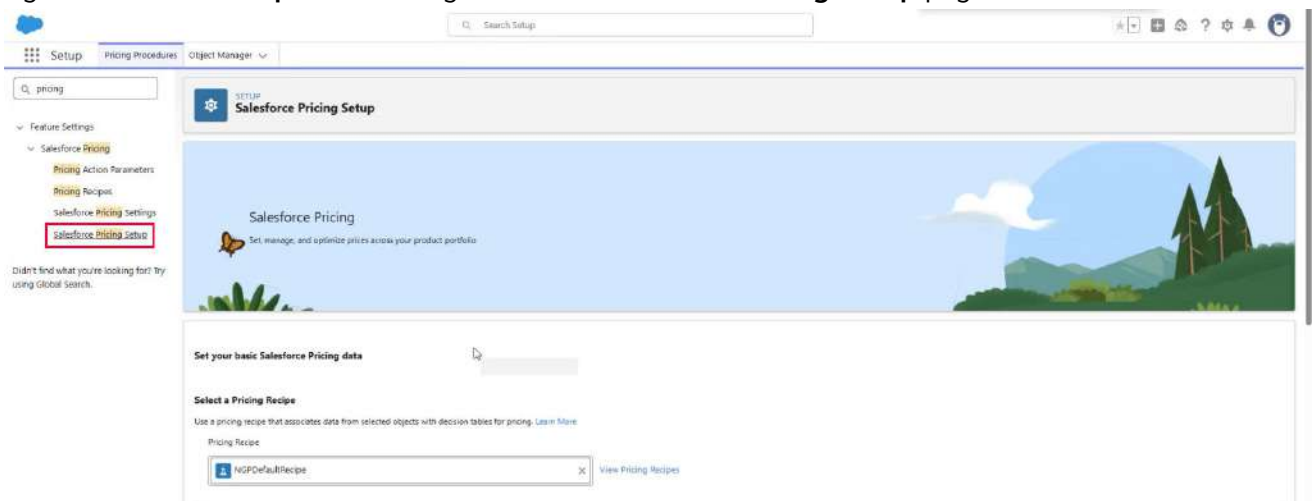
2. From the **Setup** menu, navigate to the **Revenue Settings** page.



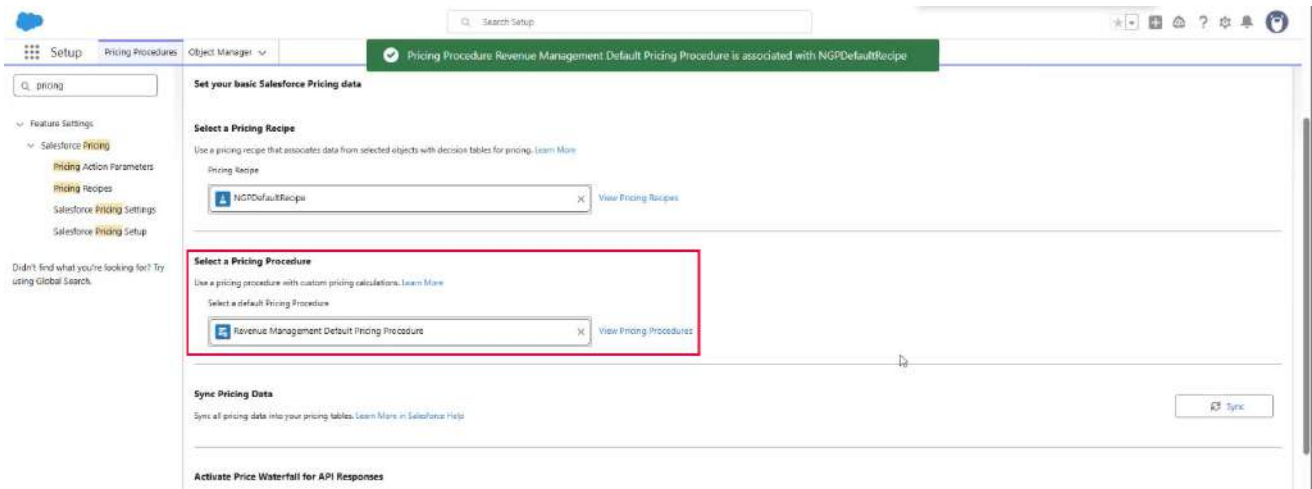
- On the **Revenue Settings** page, under the **Set Up Salesforce Pricing** section, select **Revenue Management Default Pricing Procedure** from the list.



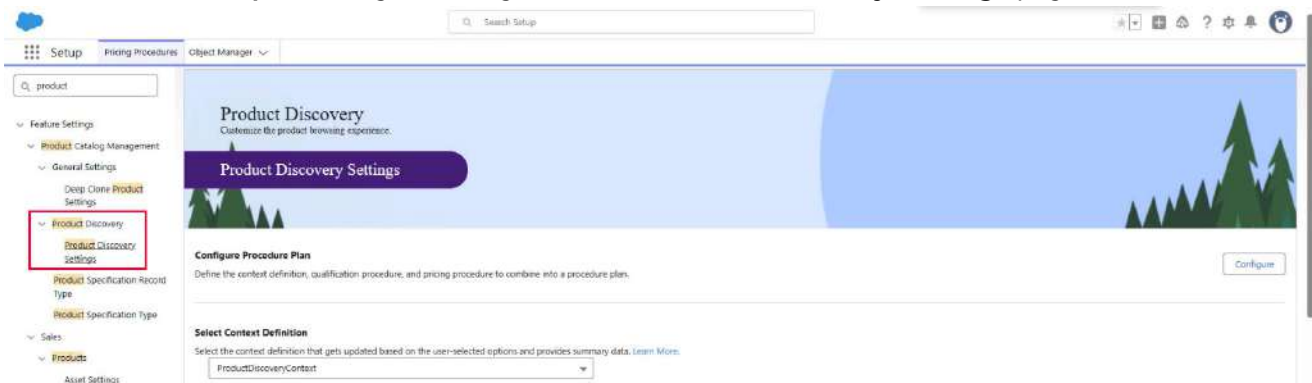
- Again, from the **Setup** menu, navigate to the **Salesforce Pricing Setup** page.



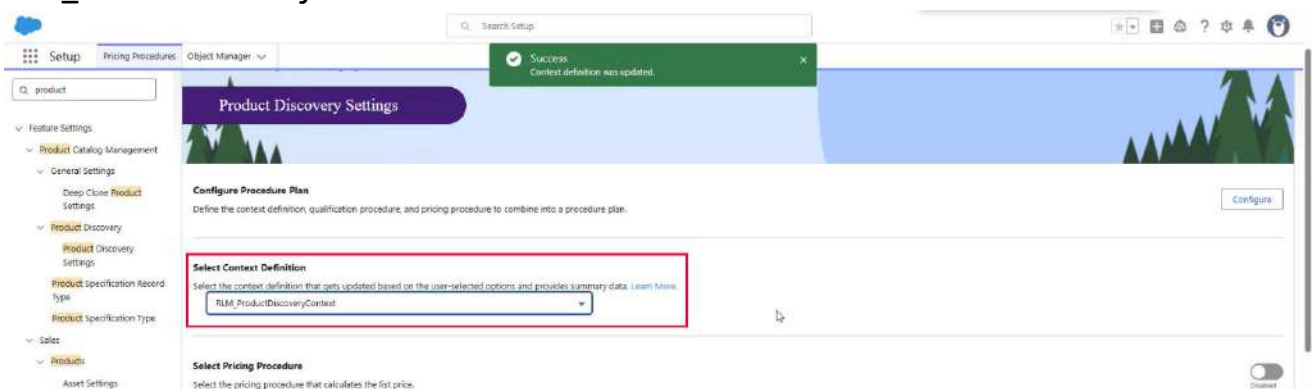
5. On the **Salesforce Pricing Setup** page, under the **Select a Pricing Procedure** section, select **Revenue Management Default Pricing Procedure** from the list.



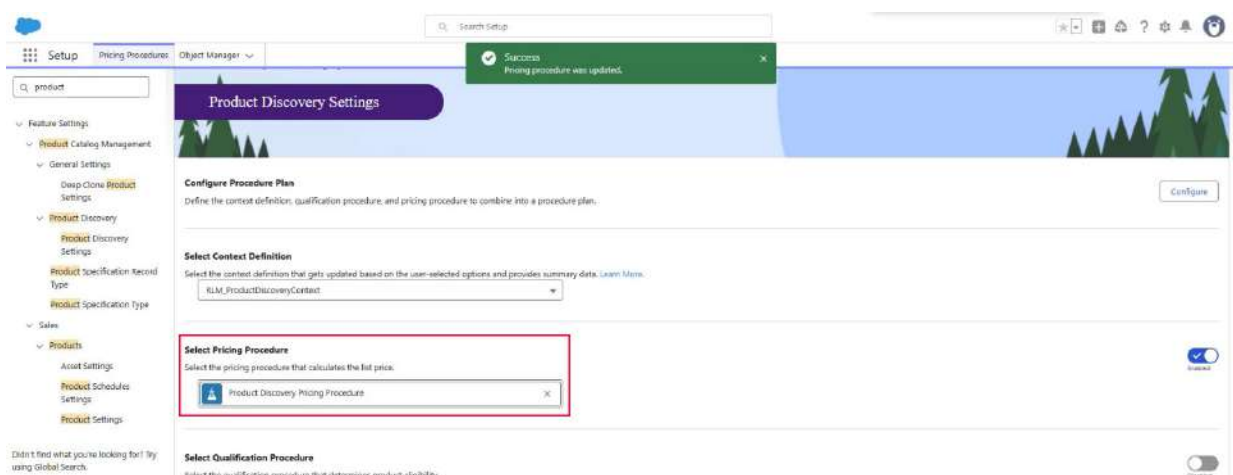
6. Now from the **Setup** menu again, navigate to the **Product Discovery Settings** page.



7. On the **Product Discovery Settings** page, under the **Select Context Definition** section, select **RLM_ProductDiscoveryContext** from the list.



8. On the same page, enable **Select Pricing Procedure**.
 - a. Under the **Select Pricing Procedure** section, select **Product Discovery Pricing Procedure** from the list.



Configure custom settings

Procedure

1. Go to **Setup**.
2. Search for **Custom Settings**.
3. Click **Manage** for the TC_Settings row.
4. Click **New**.
5. Enter the following login URL details (These are dummy details for your reference):
 - a. Set AWC_Path_c to awc.
 - b. Set MS_Path_c to tc/micro. The microservice path, such as **micro** or **sd**, will be configured according to the Active Workspace gateway config.json.
 - c. Set TC_SF_Route_c to tc/micro/tcslmassetmgmt/coc. The microservice path, such as **micro** or **sd**, will be configured according to the Active Workspace gateway config.json.
 - d. For TcX, set TC_SF_Route_c to tc/micro/tcslmassetmgmt/tcxcoc. The microservice path, such as **micro** or **sd**, will be configured according to the Active Workspace gateway config.json.
 - e. Set TC_URL_c to <Active Workspace gateway URL>.

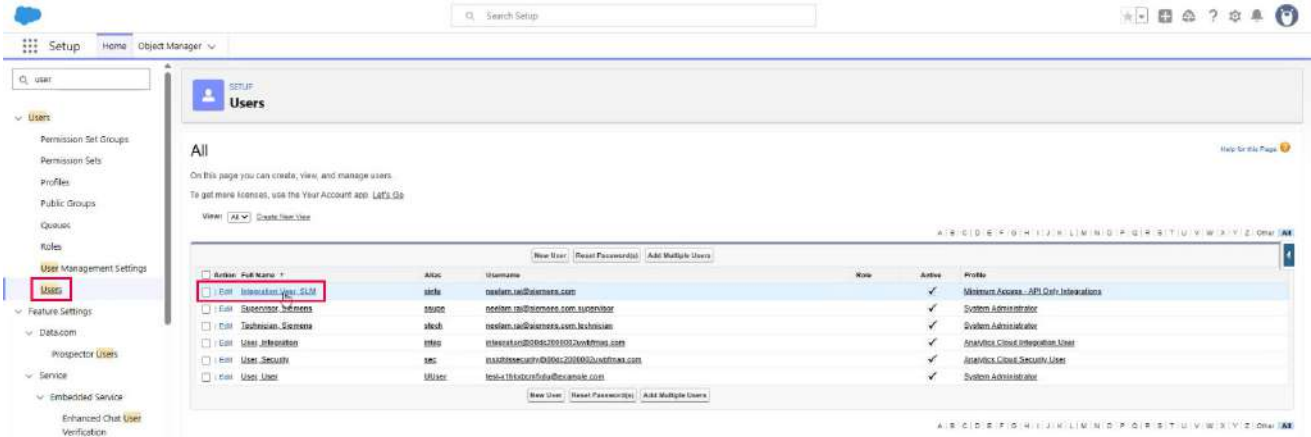
Example

https://albsf-tc2312.eu-central-1.elb.amazonaws.com

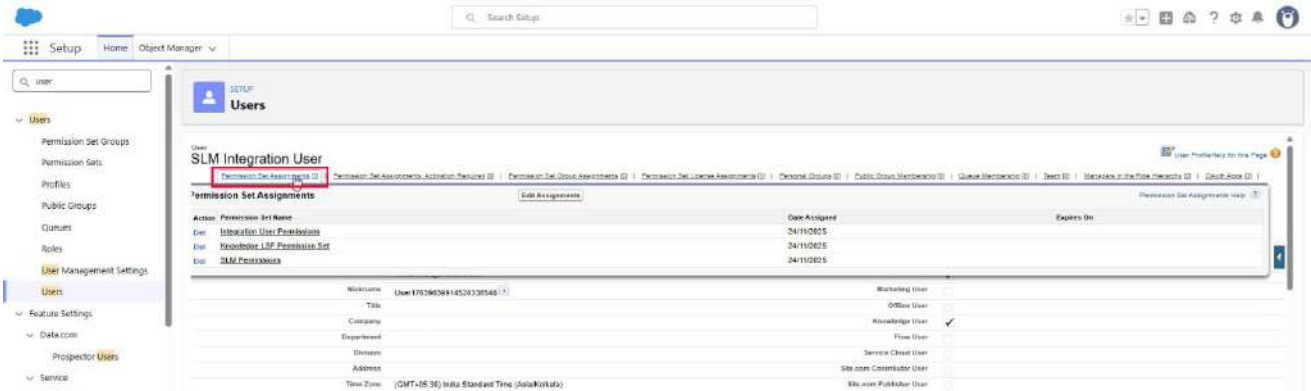
Assign permission set for integration user

Procedure

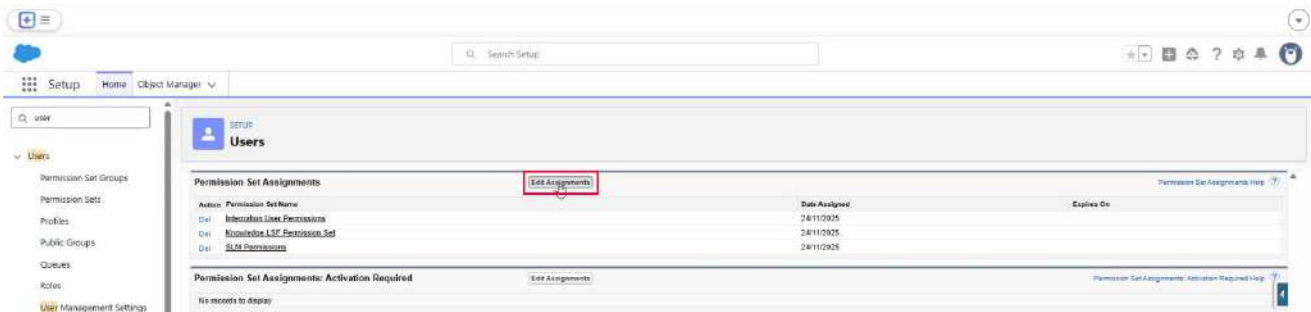
1. From the **Setup** menu, navigate to the **Users** page and select **Integration User**.



2. On the **SLM Integration User** page, click **Permission Set Assignments**.

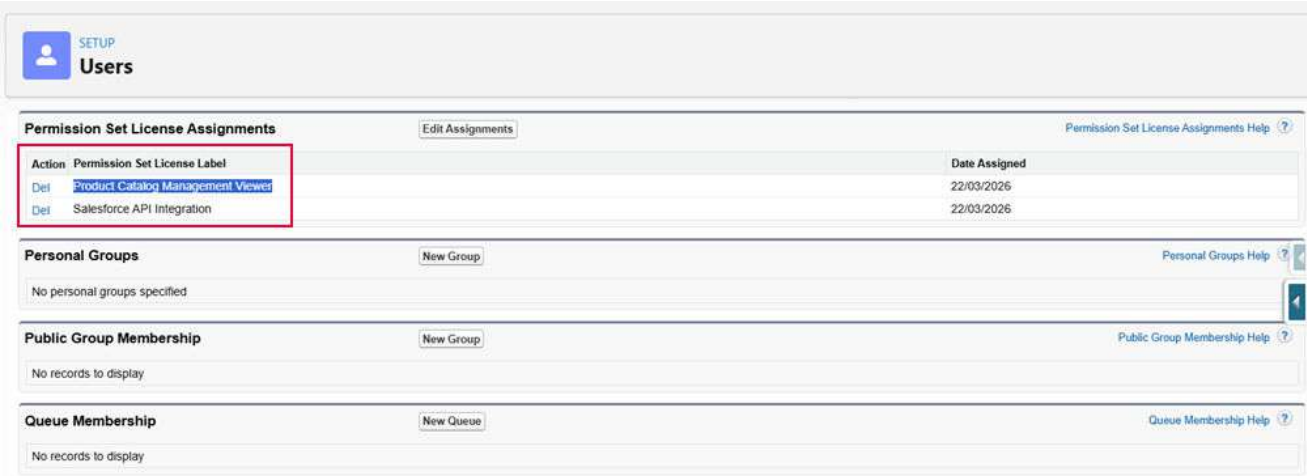


3. On the **Permission Set Assignments** page, click **Edit Assignments**.

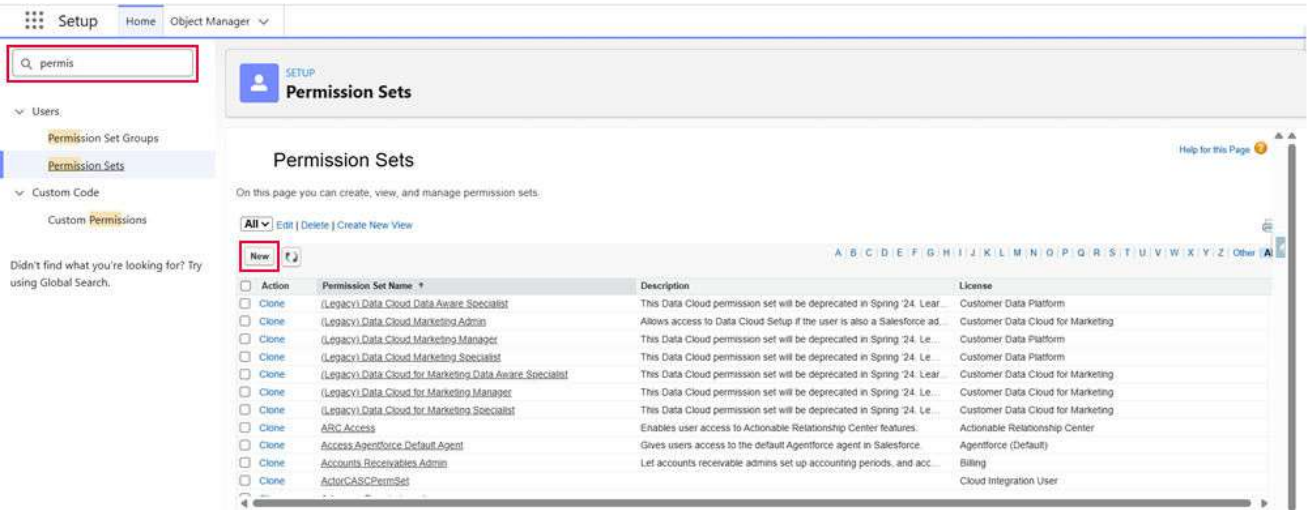


4. Select the following permission set licenses:

- **Salesforce API Integration**
- **Product Catalog Management Viewer**



- 5. Add **SLM RLM Integration User** and **Product Catalog Management Viewer** from the **Available Permission Sets** column to the **Enabled Permission Sets** column and click **Save**.
- 6. In the **Quick Find** box, search for **Permission Sets** and click **New** from the **Permission Sets** page.



The **Create** page opens.

- 7. On the **Create** page, enter **RLM Additional Permission** as the permission set name and click **Save**.
- 8. From the **Permission Sets** page, click **Object Settings** and search for the **Product** and **Product Component Group** objects.
- 9. Grant access to both objects and click **Save**.
- 10. Assign the created permission set to the Integration User.

Setup

Home

Object Manager

Q. permis

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Didn't find what you're looking for? Try using Global Search.

SETUP

Permission Sets

Product Classifications	ProductClassification	No Access	9	--
Product Component Group Overrides	ProductComponentGrpOverride	No Access	11	--
Product Component Groups	ProductComponentGroup	Read, Create, Edit, Delete, View All Records, Modify All Fields	14	--
Product Configuration Flow Assignments	ProductConfigFlowAssignment	--	5	--
Product Configuration Flows	ProductConfigurationFlow	No Access	4	--
Product Configuration Rules	ProductConfigurationRule	No Access	--	--
Product Consumed States	ProductConsumedState	--	7	--
Product Consumption Schedules	ProductConsumptionSchedule	--	6	--
Product Decomposition Enrichment Rules	ProductDecompEnrichmentRule	No Access	16	--
Product Decomposition Enrichment Variable Mappings	ProductDecompEnrichVarMap	No Access	11	--
Product Disqualifications	ProductDisqualification	No Access	14	--
Product Fulfillment Decomposition Rules	ProductFulfillmentDecompRule	No Access	14	--
Product Import Details	siemensdm__Product_Import_Details__c	No Access	10	--
Product Items	ProductItem	No Access	12	--
Product Item Transactions	ProductItemTransaction	--	10	--
Product Media	ProductMedia	--	4	--
Product Performance	PricingAnalyticsProduct	--	--	--
Product Qualifications	ProductQualification	No Access	14	--
Product Ramp Segments	ProductRampSegment	No Access	10	--
Product Related Component Overrides	ProductRelComponentOverride	No Access	18	--
Product Related Components	ProductRelatedComponent	--	25	--
Product Relationship Types	ProductRelationshipType	No Access	7	--
Product Request Line Items	ProductRequestLineItem	--	21	--
Product Requests	ProductRequest	No Access	19	--
Products	Product2	Read, Create, Edit, Delete, View All Fields	36	--

Configure Revenue Lifecycle Management App in App Manager

Procedure

1.

From the **Setup** menu, navigate to the **App Manager** page.
2.

Search for the **Revenue Lifecycle Management** app and select **Edit** from the drop-down list of this app.

Setup

Home

Object Manager

Q. app man

Apps

App Manager

External Client Apps

External Client App Manager

Lightning Out 2.0 Apps

Lightning Out 2.0 App Manager

Didn't find what you're looking for? Try using Global Search.

SETUP

Lightning Experience App Manager

New Lightning App

New External Client App

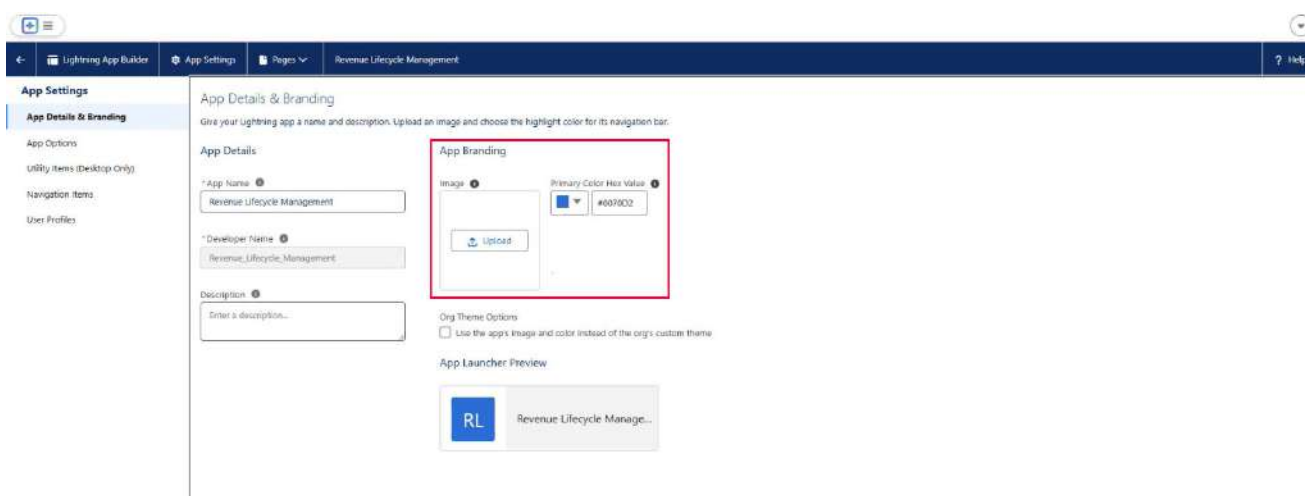
20 items • Sorted by App Name • Filtered by All appowners • Set Set Type, App Type

App Name ↑	Developer Name	Description	Last Modified Date	App Type	Visible in ...
1. All Tabs	AllTabSet		30/10/2023, 5:54 pm	Classic	✓
2. Analytics Studio	Insights	Build CRM Analytics dashboards and apps	30/10/2023, 5:54 pm	Classic	✓
3. App Launcher	AppLauncher	App Launcher tabs	30/10/2023, 5:54 pm	Classic	✓
4. Approvals	Approvals	Manage approvals and approval flows	30/10/2023, 5:55 pm	Lightning	✓
5. Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	30/10/2023, 5:55 pm	Lightning	✓
6. Business Rules Engine	EnginesetConsole	Configure and maintain business rules that perform complex lookups and calculations.	24/11/2023, 11:11 am	Lightning	✓
7. Community	Community	Salesforce CRM Communities	30/10/2023, 5:54 pm	Classic	✓
8. Content	Content	Salesforce CRM Content	30/10/2023, 5:54 pm	Classic	✓
9. Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage objects.	30/10/2023, 5:54 pm	Lightning	✓
10. Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	30/10/2023, 5:54 pm	Lightning	✓
11. Force.com	Force.com	Start here	30/10/2023, 5:54 pm	Classic	✓
12. Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	30/10/2023, 5:54 pm	Classic	✓
13. Platform	Platform	The fundamental Lightning Platform	30/10/2023, 5:54 pm	Classic	✓
14. Price Management	PriceManagement	Set, manage, and optimize prices across your product and service portfolio.	24/11/2023, 2:32 pm	Lightning	✓
15. Pricing Operations Console	OperationsConsole	Centralized platform for all aspects of operations	24/11/2023, 2:22 pm	Lightning	✓
16. Product Catalog Management	IndustriesPrc	Manage product catalog with attributes, product classifications, products, catalogs, and rules.	24/11/2023, 11:11 am	Lightning	✓
17. Rate Management	RatingManagement	Set, manage, and optimize rates across your usage-based product portfolio.	24/11/2023, 11:12 am	Lightning	✓
18. Revenue Lifecycle Management	Revenue_Lifecycle_Management		24/11/2023, 2:04 pm	Lightning	✓
19. Sales	Sales	The world's most popular sales force automation (SFA) solution	30/10/2023, 5:54 pm	Classic	✓

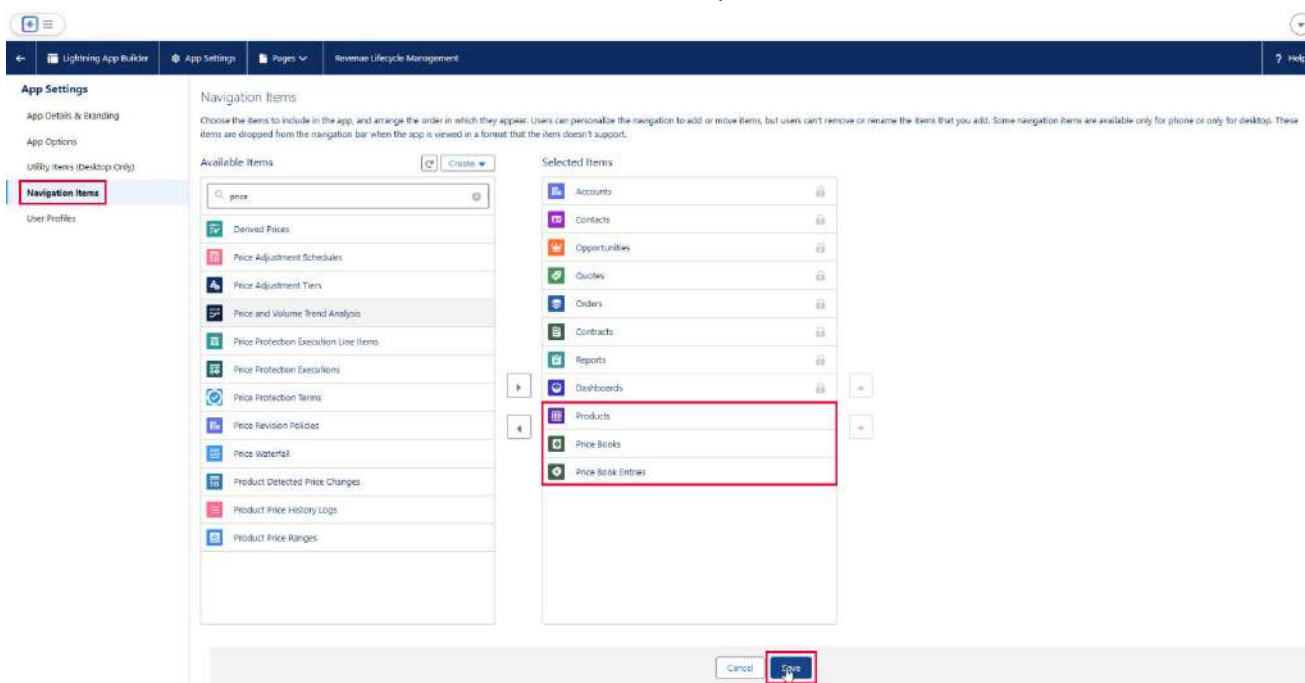
The **App Settings** page opens.

3.

On the **App Details & Branding** tab, under **App Branding**, you can add an image for your branding.



- From the **App Settings** menu, go to the **Navigation Items** tab and add the **Products**, **Price Books**, and **Price Book Entries** items to the **Selected Items** list, then click **Save**.



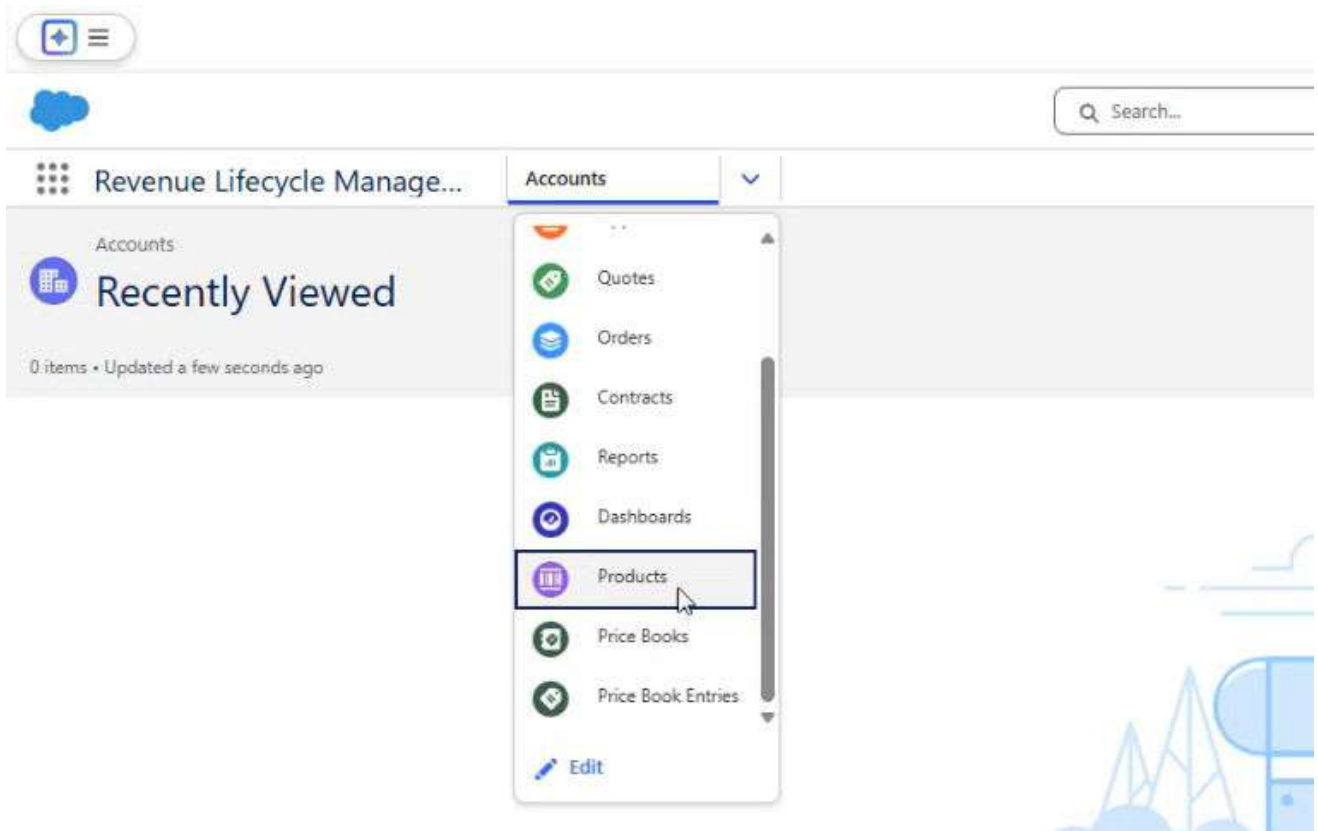
You are now ready to use the **Revenue Lifecycle Management** app from the **Salesforce App Launcher**.

Add structure tab for product (optional)

This step is optional and allows you to view the structure for a given product catalog.

Procedure

- Open the **Revenue Lifecycle Management** app and select **Products** from the drop-down list.



2. On the **Products** page, click **New**.



3. In the **New Product** dialog box, enter the **Product Name**, select the **Active** checkbox, and then click **Save**.

Revenue Lifecycle Manage... Products ▾ New Product

Recently Viewed ▾ 0 items • Updated a few seconds ago

Search this list...

Recently Viewed ▾

You haven't viewed any Products recently. Try switching list views.

New Product

Product Information

*Product Name Active ☐

Product Code Product Family

Product Description

Cancel Save & New Save

- Navigate to the **Setup** menu and select **Edit Page** from the list.

Search...

Test | Product

Product Test

Product Code Product Family

Configuration Related **Details**

Product Name: Test Active: ☒

Product Code Product Family

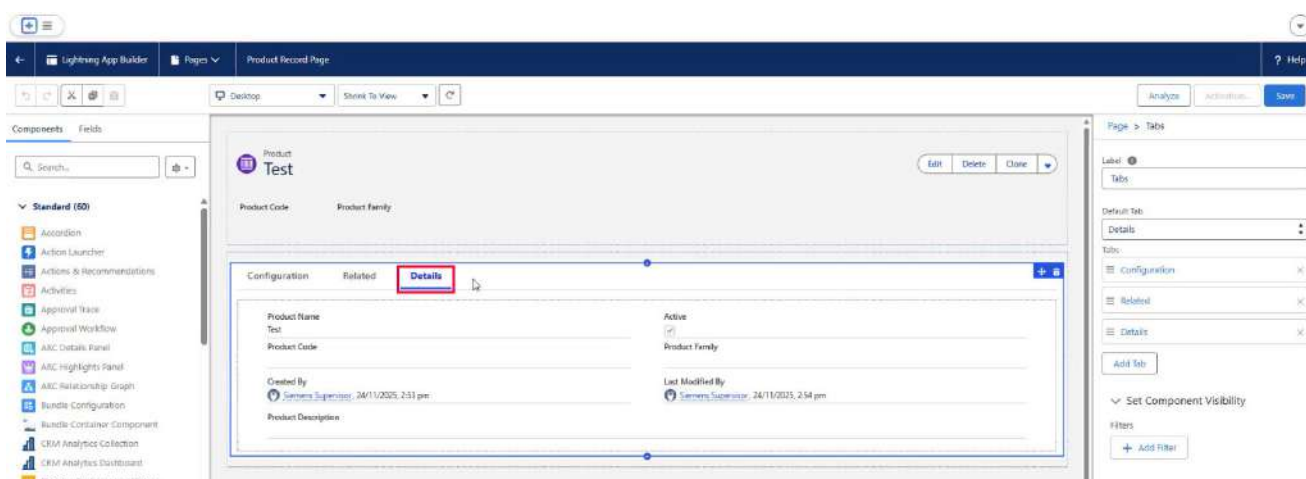
Created By: Siemens Supervisor, 24/11/2023, 2:53 pm Last Modified By: Siemens Supervisor, 24/11/2023, 2:54 pm

Product Description

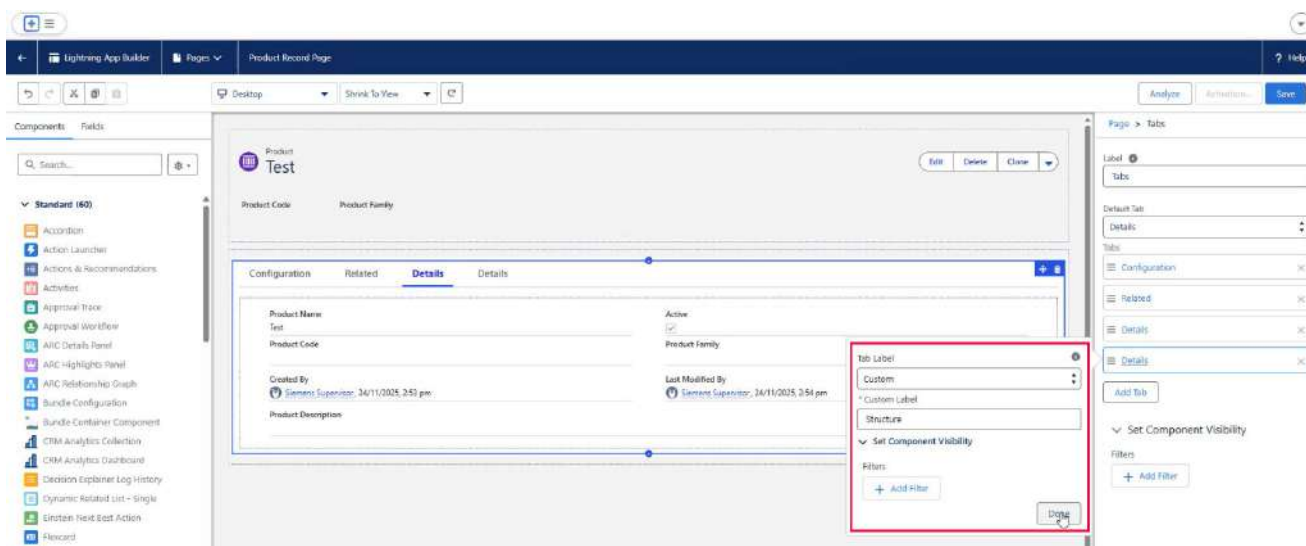
Setup Menu

- Setup
- Service Setup
- Salesforce Go
- Developer Console
- Edit Page**
- Edit Object

- Click the **Details** tab to edit the tabs.



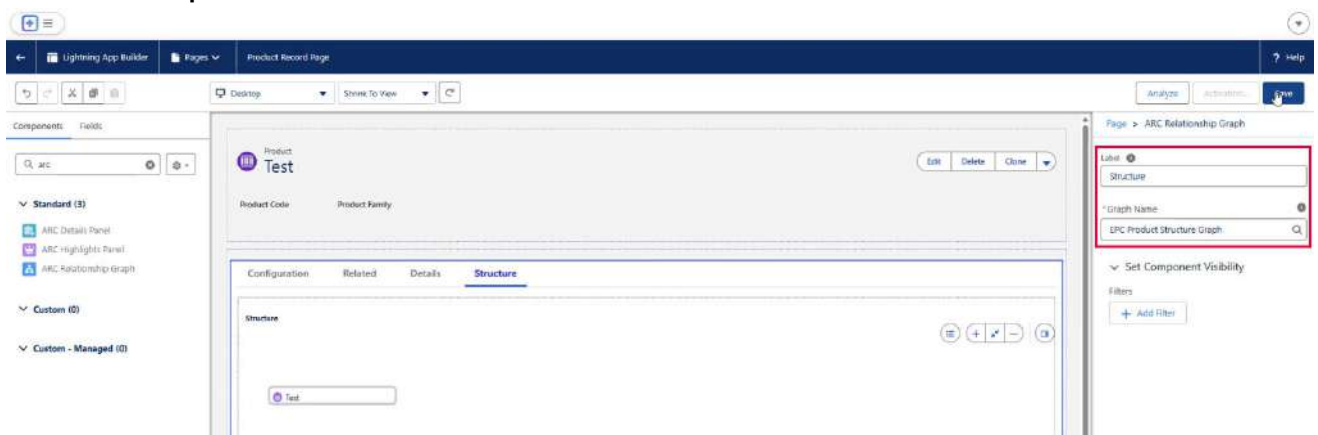
6. In the **Tabs** panel, click **Add Tab**.
 - a. Click the newly created tab in the list.
The dialog box for the newly created tab opens.
 - b. In the dialog box, for **Tab Label**, select **Custom** from the list.
 - c. For **Custom Label**, enter the value as **Structure**.
 - d. Click **Done**.



7. Navigate to the newly added **Structure** tab and drag **ARC Relationship Graph** from the **Components** panel to the left of this page to the **Structure** tab.



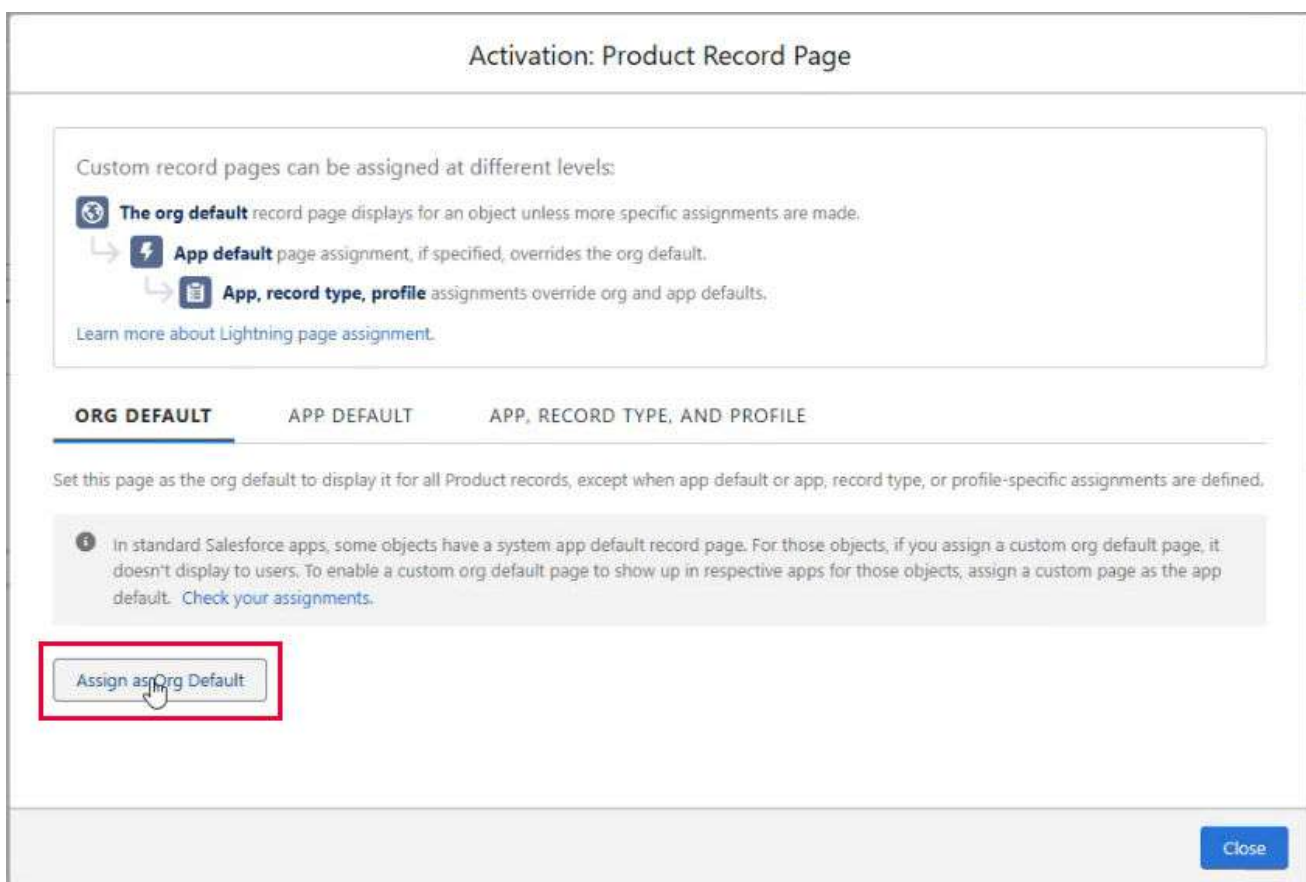
8. Go to the **ARC Relationship Graph** panel, add **Label** as **Structure** and **Group Name** as **EPC Product Structure Graph**.



9. Click **Save**.
10. In the **Page Saved** dialog box, click **Activate**.

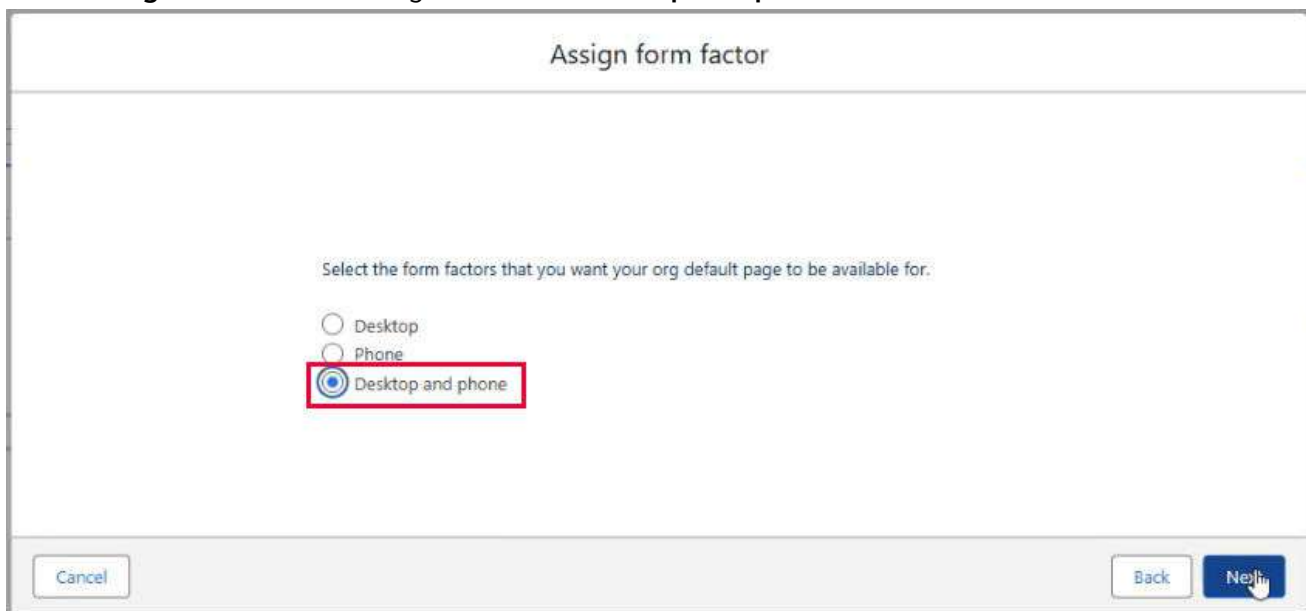


11. In the **Activation: Product Record Page** dialog box, click **Assign as Org Default**.



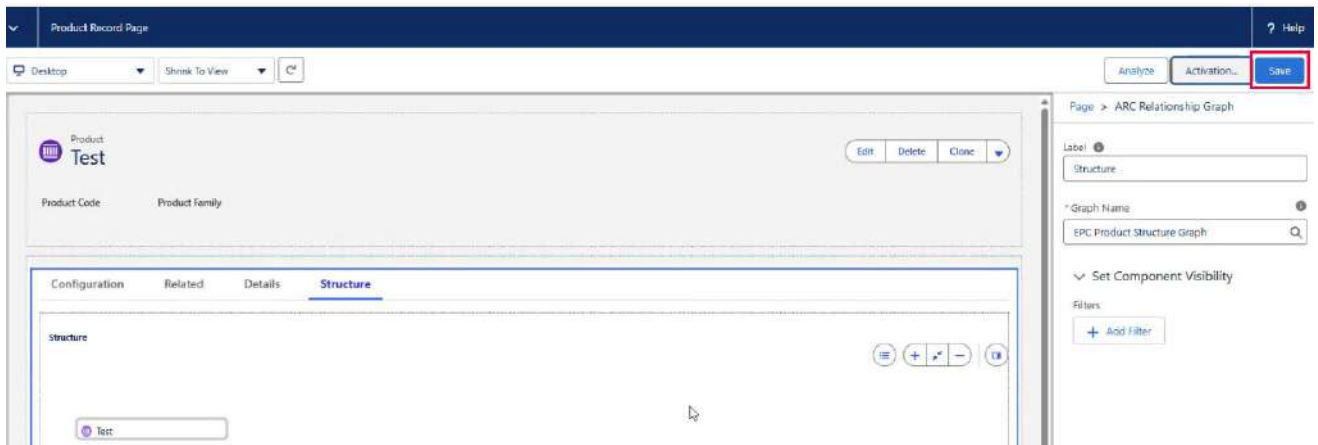
The **Assign form factor** dialog box opens.

12. In the **Assign form factor** dialog box, select **Desktop and phone** and click **Next**.



13. In the **Review assignment** dialog box, click **Save**.

14. Finally, on the **Product Page**, click **Save**.

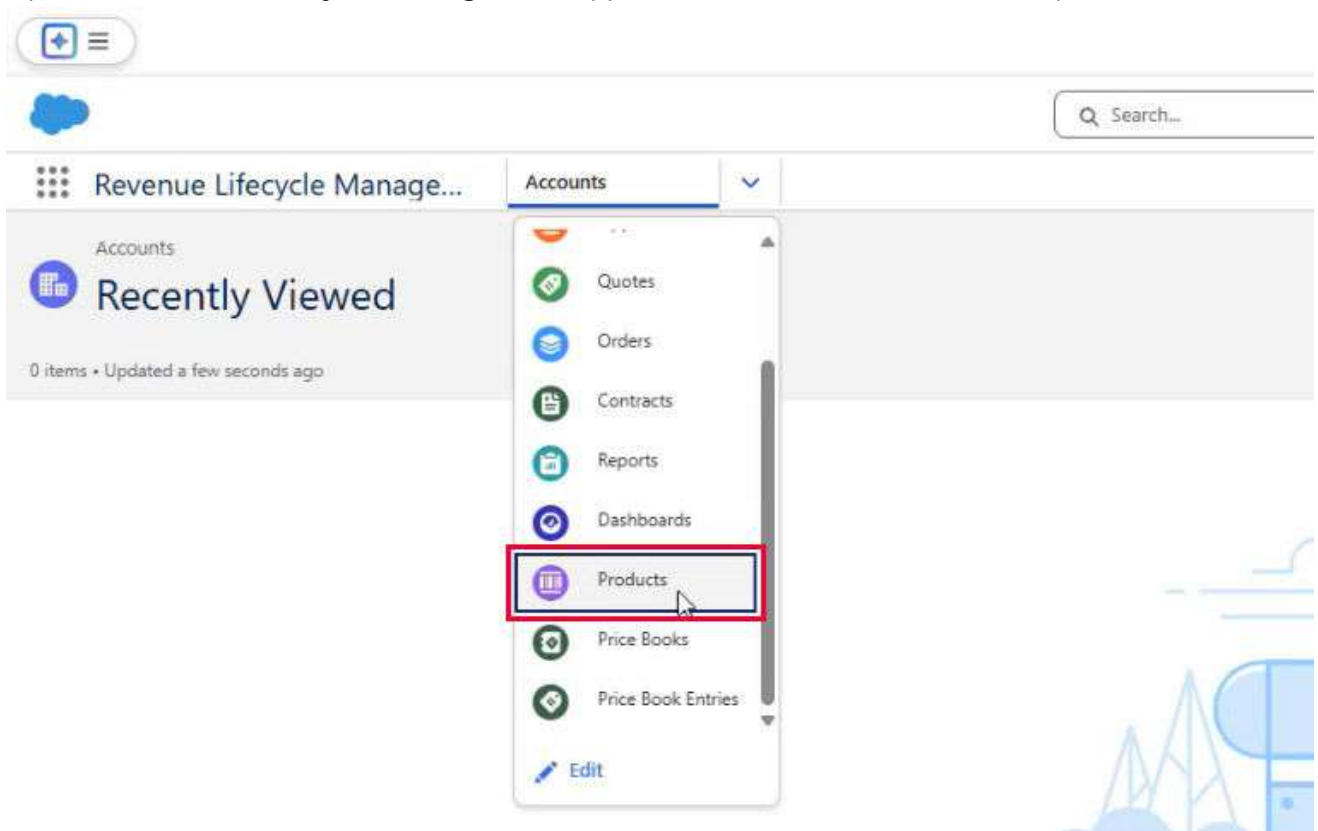


Add UID and price book entry for product

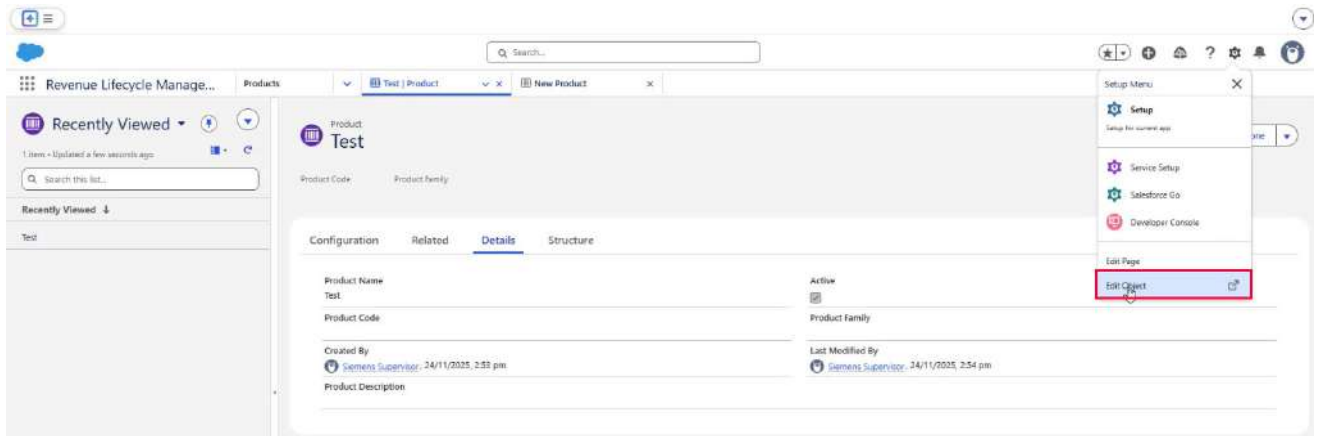
With these steps, you can ensure that the UID and Price Book Entry fields are properly configured and visible.

Procedure

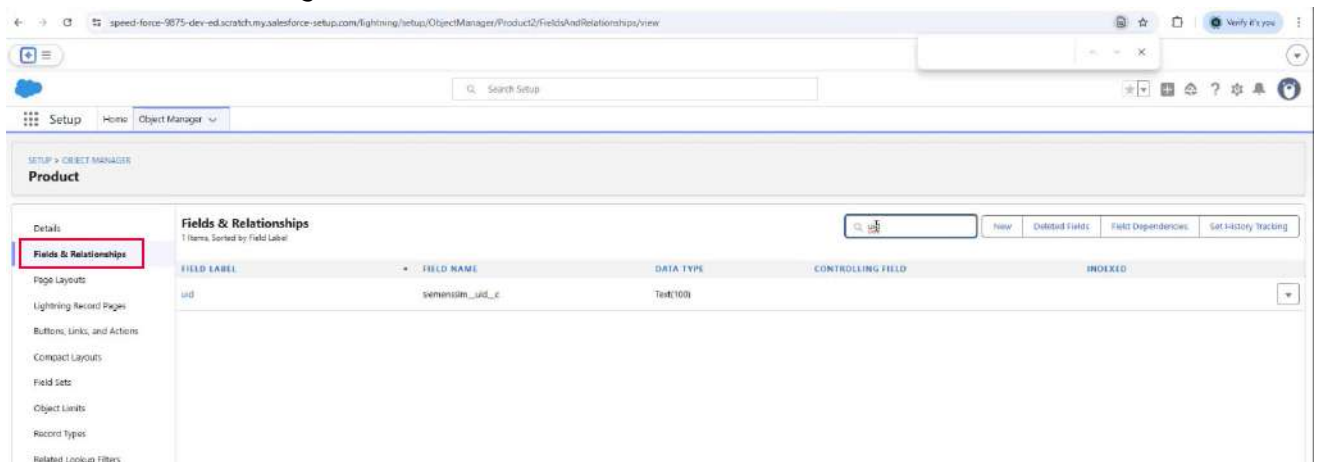
1. Open the **Revenue Lifecycle Management** app and select **Products** from the drop-down list.



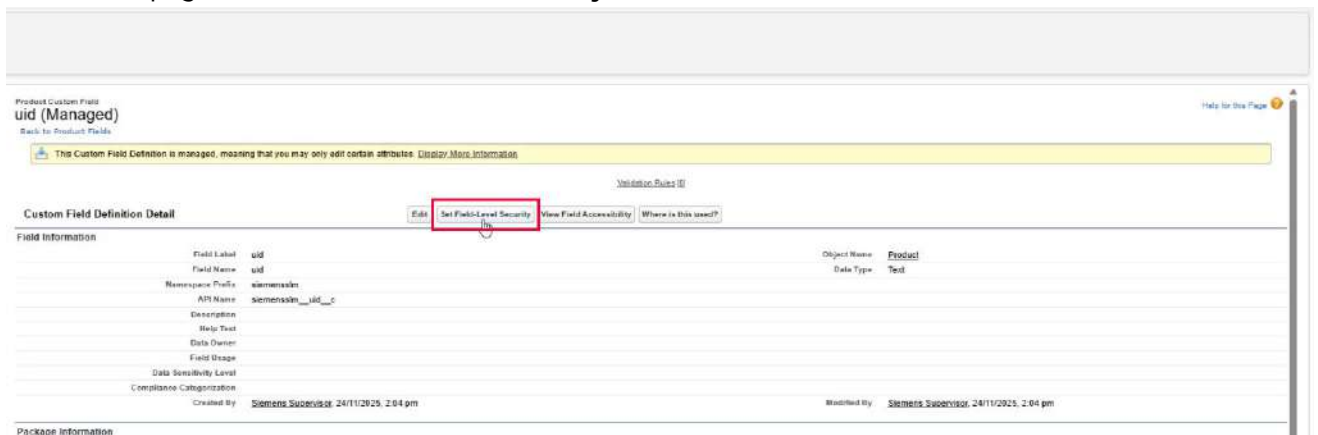
- On the **Products** page, open the required product and choose **Setup→Edit Object**.



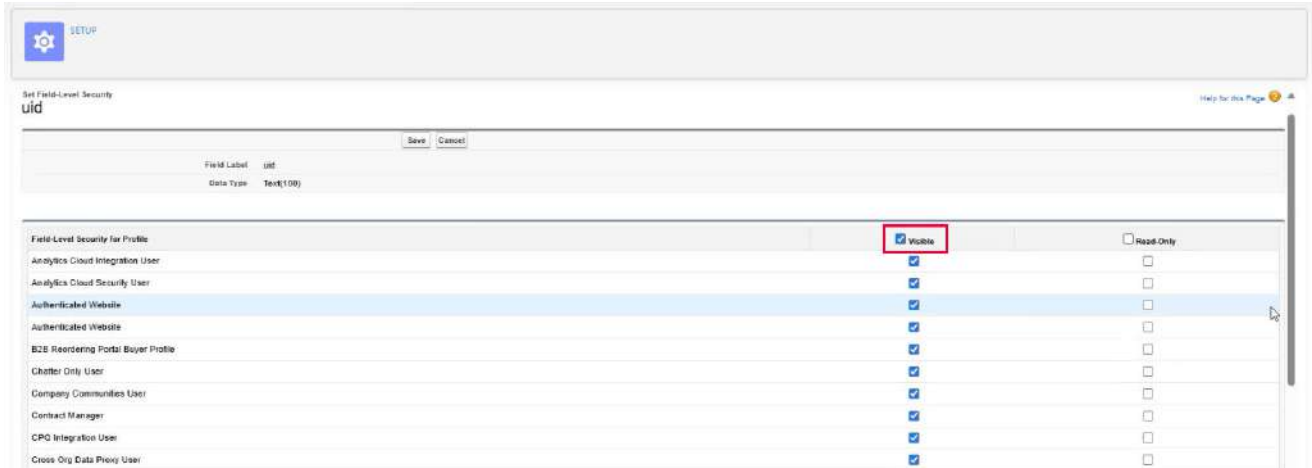
- On the **Object Manager** page, navigate to the **Fields and Relationships** tab on the left-side panel, and search for **uid** using the **Search** bar.



- On the **uid** page, click **Set Field-Level Security**.



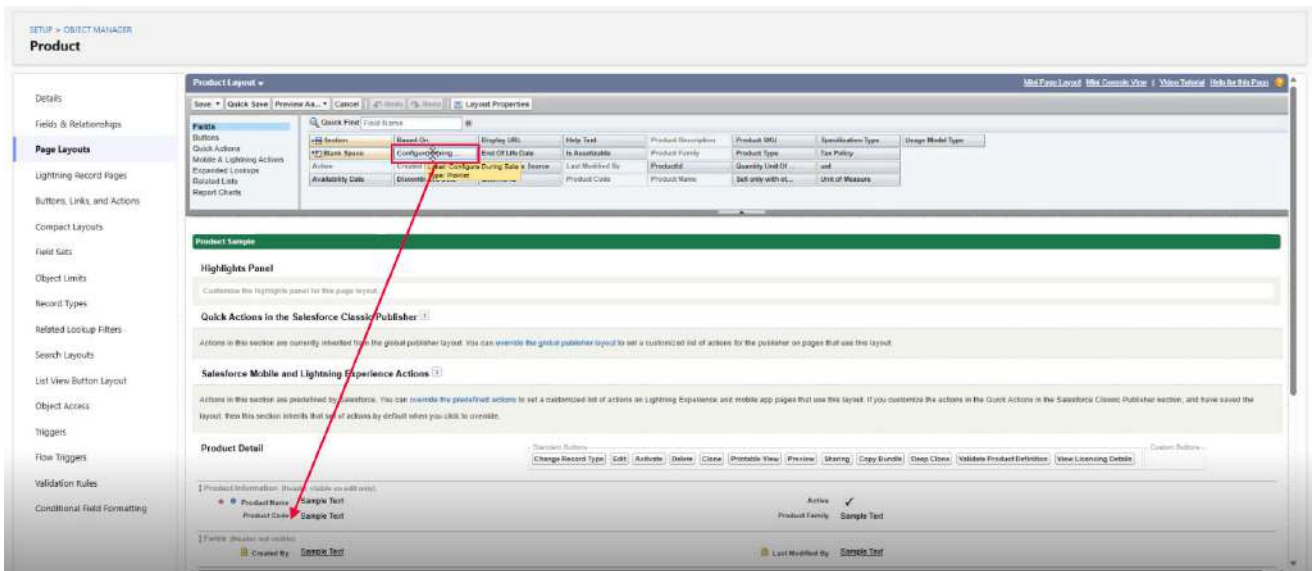
5. On the **Set Field-Level Security** page, select the **Visible** checkbox on the table header and click **Save**.



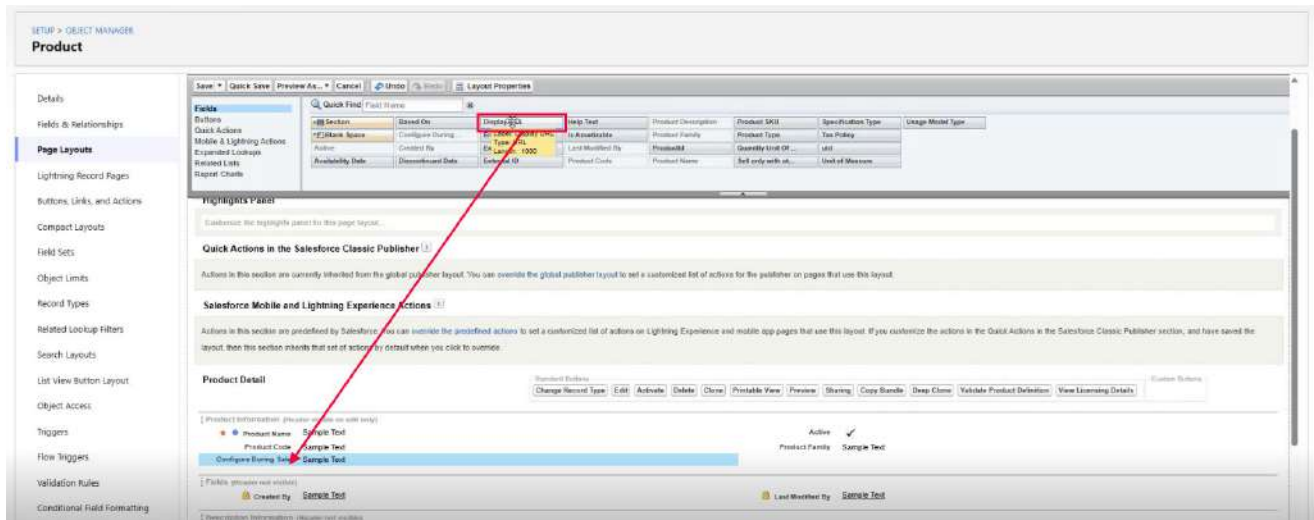
6. On the **Object Manager** page, navigate to the **Page Layouts** tab on the left-side panel, and click **Product Layout**.



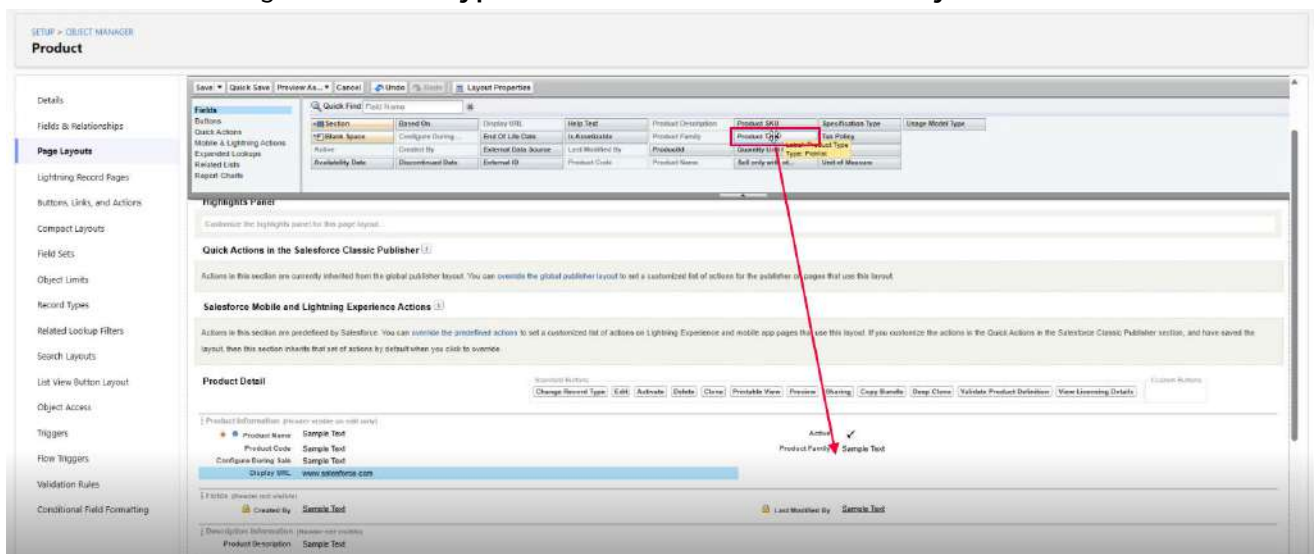
7. On the **Product Layout** page, select and drag the **Configure During Sale** field to below the **Product Code** field.



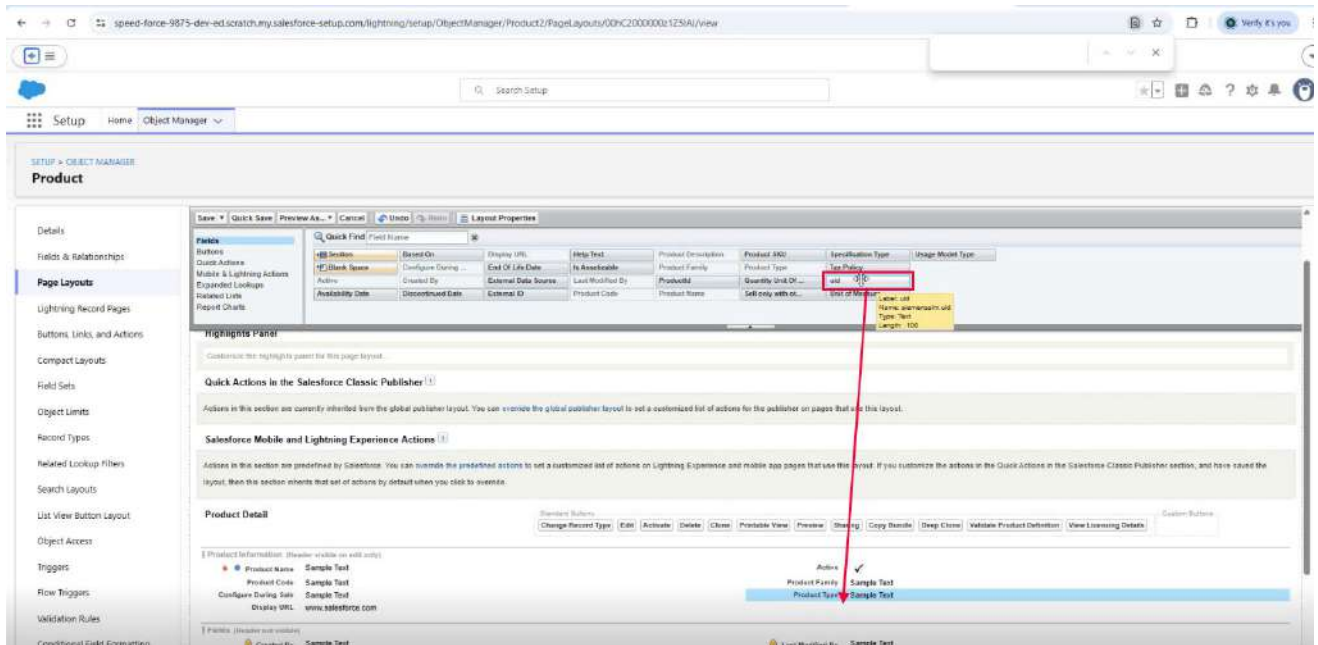
8. Similarly, select and drag the **Display URL** field to below the **Configure During Sale** field.



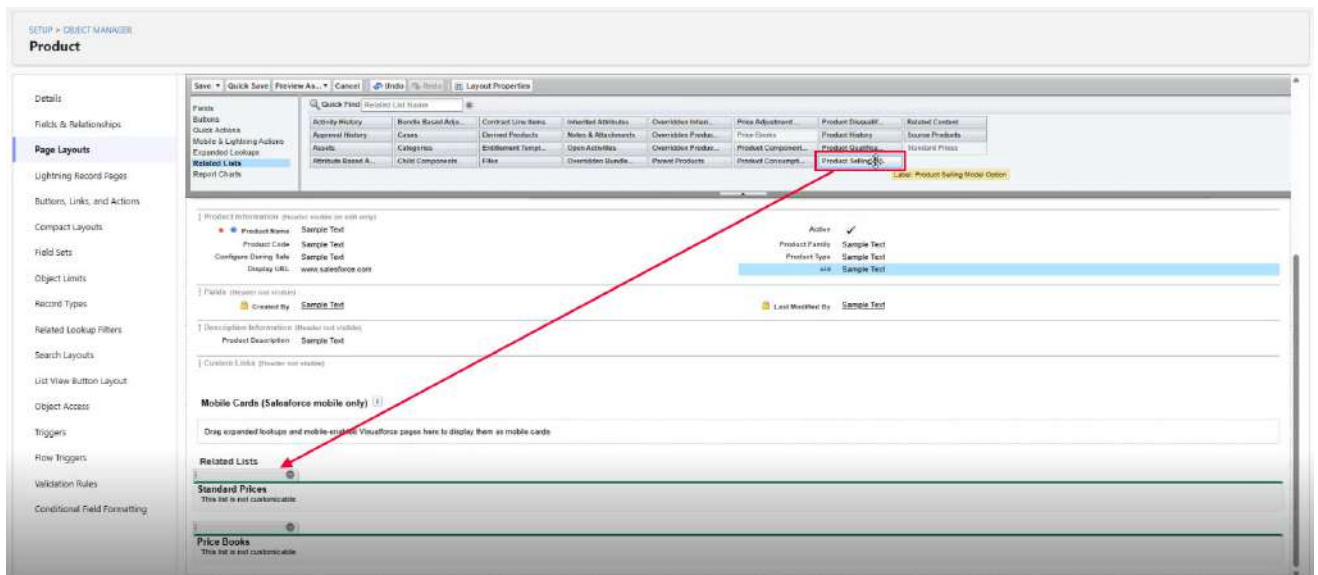
9. Now, select and drag the **Product Type** field to below the **Product Family** field.



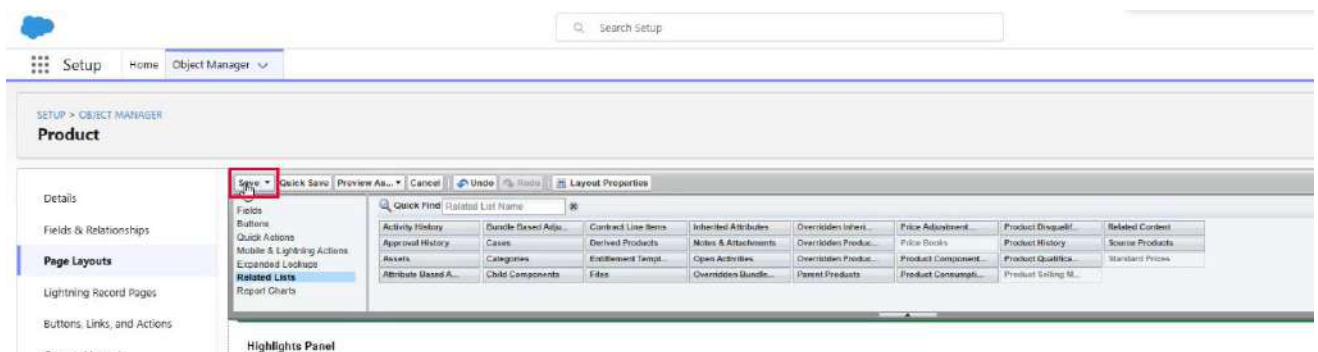
10. Select and drag the **uid** field to below the **Product Type** field.



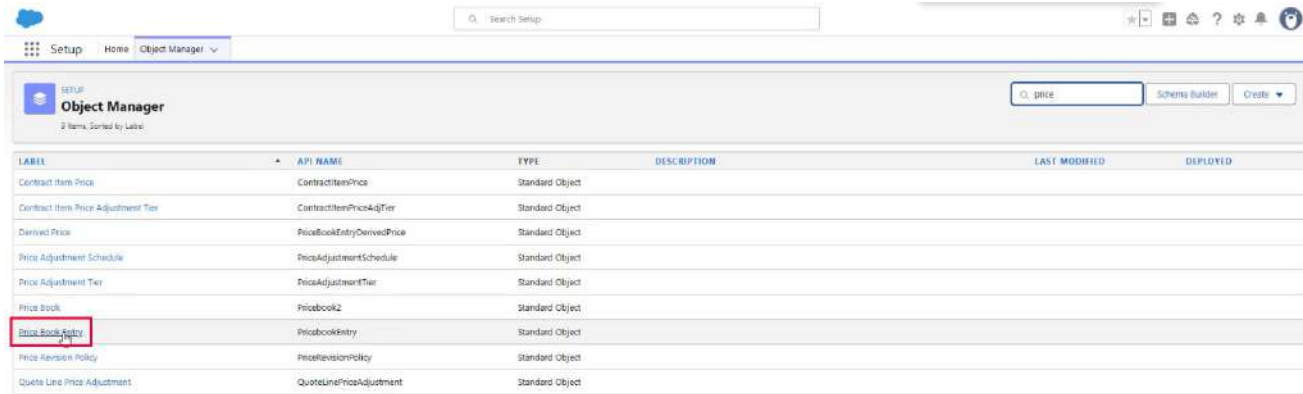
11. On the **Product Layout** page, go to the **Related Lists** tab, and select and drag the **Product Selling Model** field to the **Related Lists** section.



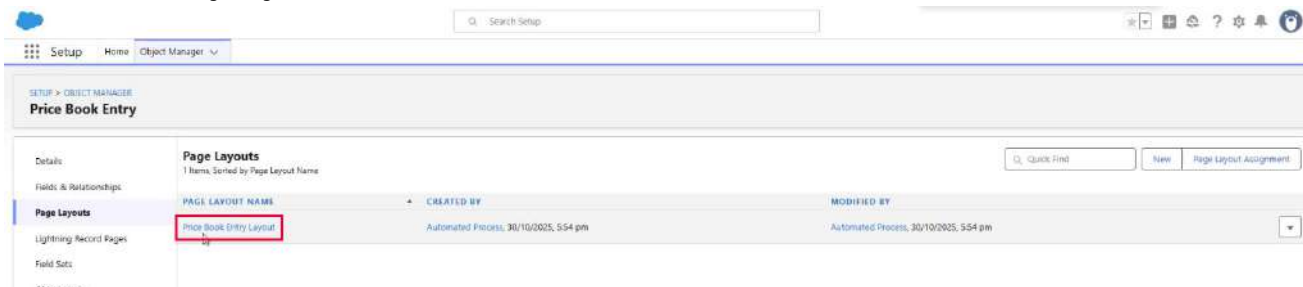
12. Click **Save**.



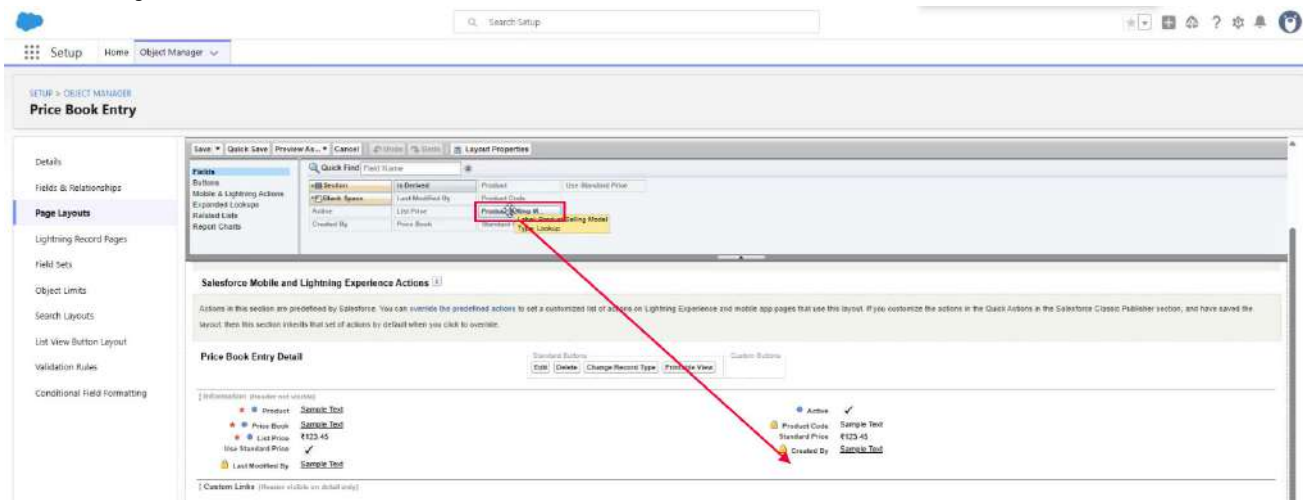
13. In the **Overwrite Users' Related List Customizations?** dialog box, click **Yes**.
14. Navigate to the **Object Manager** page and search for **price book entry** using the **Search** box.



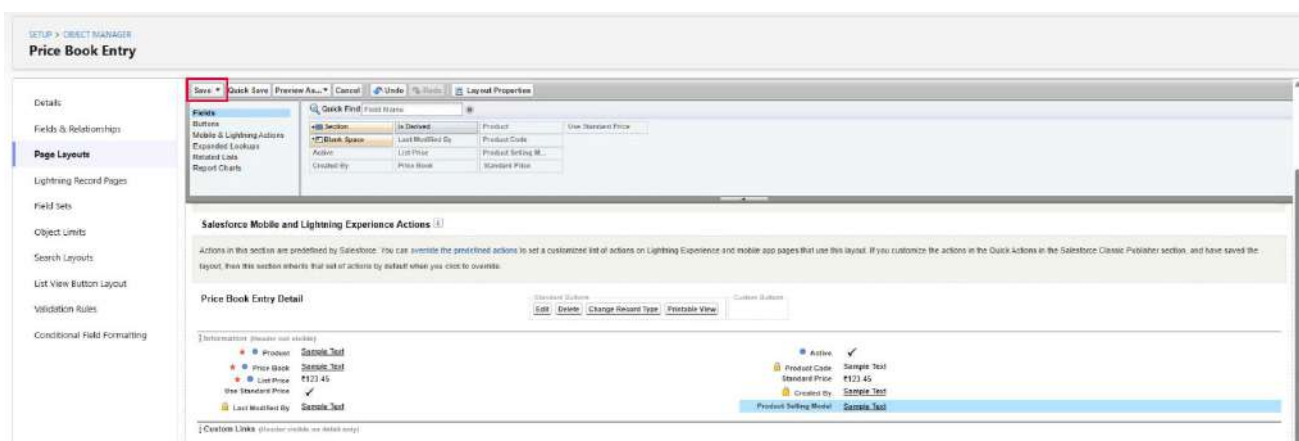
15. On the **Price Book Entry** page, navigate to the **Page Layouts** tab on the left-side panel, and click **Price Book Entry Layout**.



16. On the **Price Book Entry Layout** page, select and drag the **Product Selling Model** field to below the **Created By** field.



17. Click **Save**.



Note

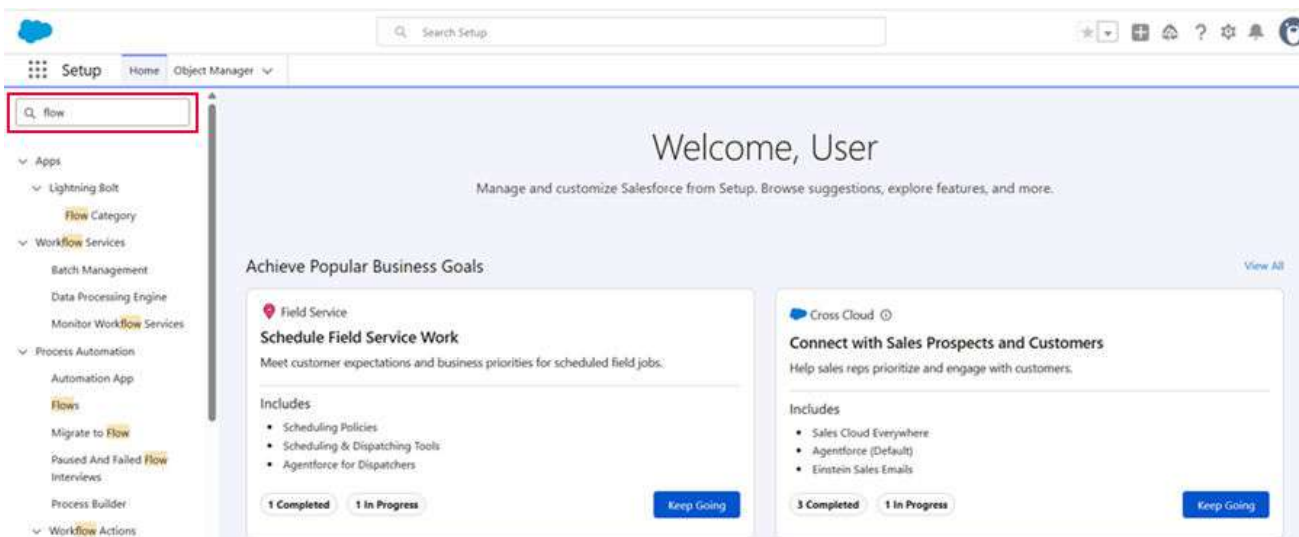
Ensure that you have added the required Product Selling Models, Product Catalogs, Price Books, and defined the necessary Product Configurator Flow.

Set up custom configurator

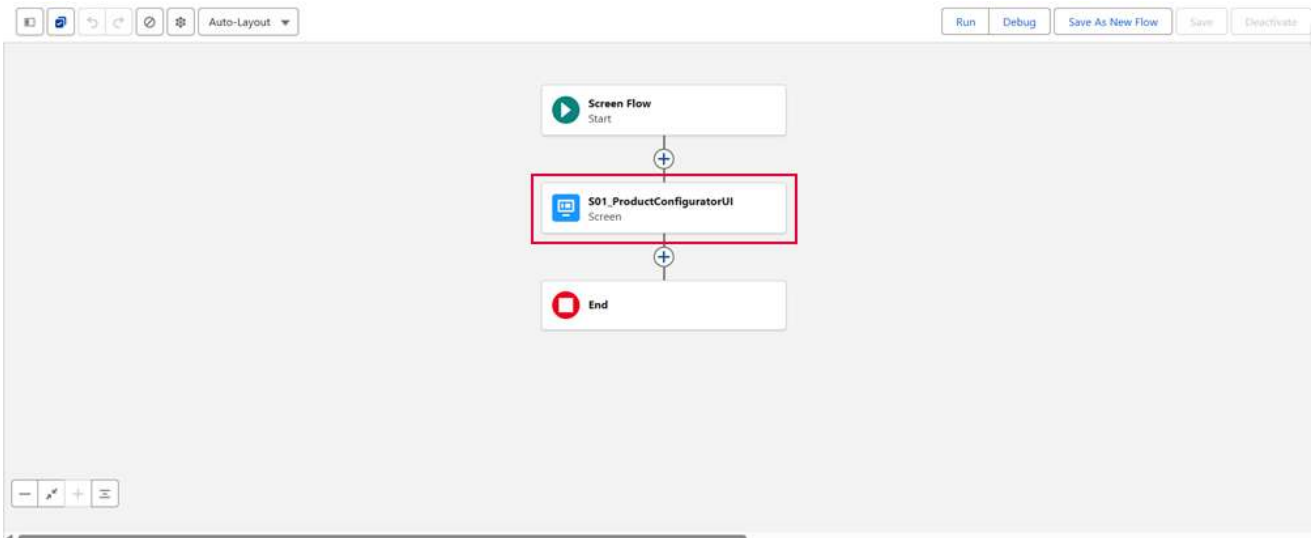
Set up a custom screen flow for the RLM configurator to enable product-specific configuration in Salesforce.

Procedure

1. Click **Setup**, and in the **Quick Find** box, search for **Flows**.

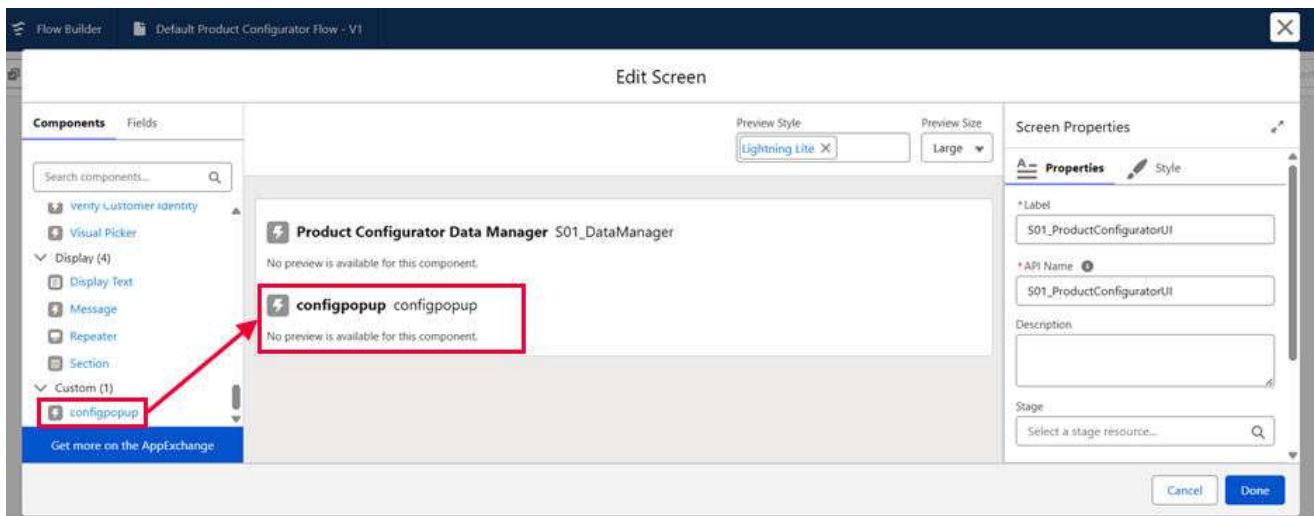


2. From the list of flows, search for **Default Product Configurator Flow**.
3. Open **Default Product Configurator Flow** and click **S01_ProductConfiguratorUI** screen flow.

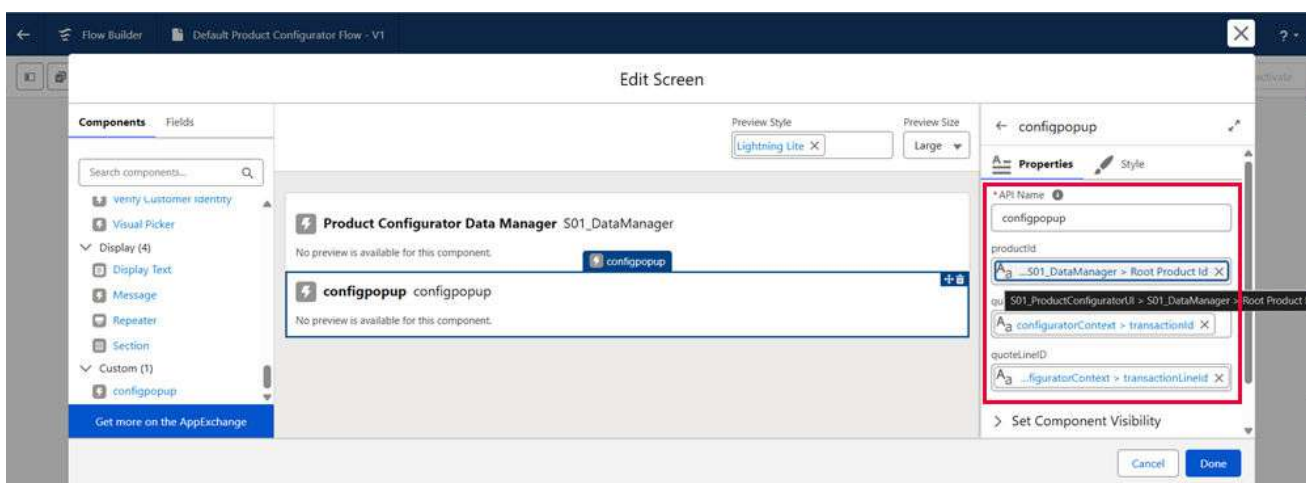


The **Edit Screen** page opens.

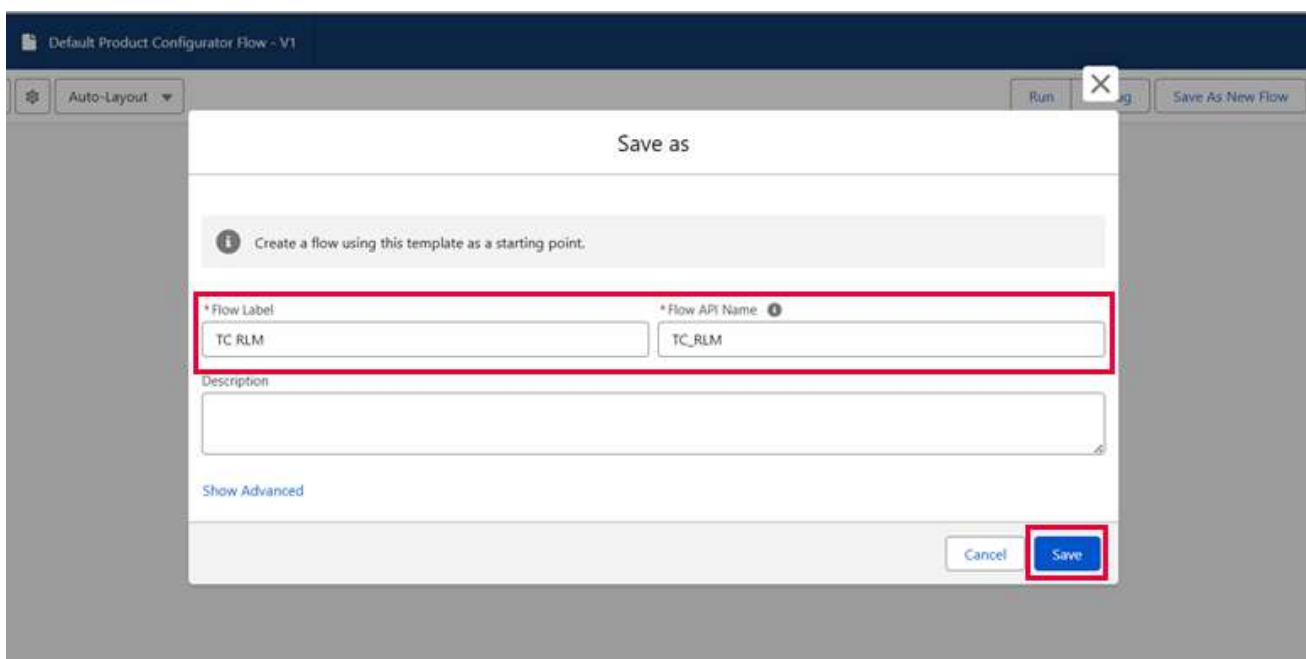
4. On the **Edit Screen** page, remove all properties except **Product Configurator Data Manager**.
5. From the left panel, under the **Components** tab, search for **Config Popup** and drag **Config Popup** below **Product Configurator Data Manager**.



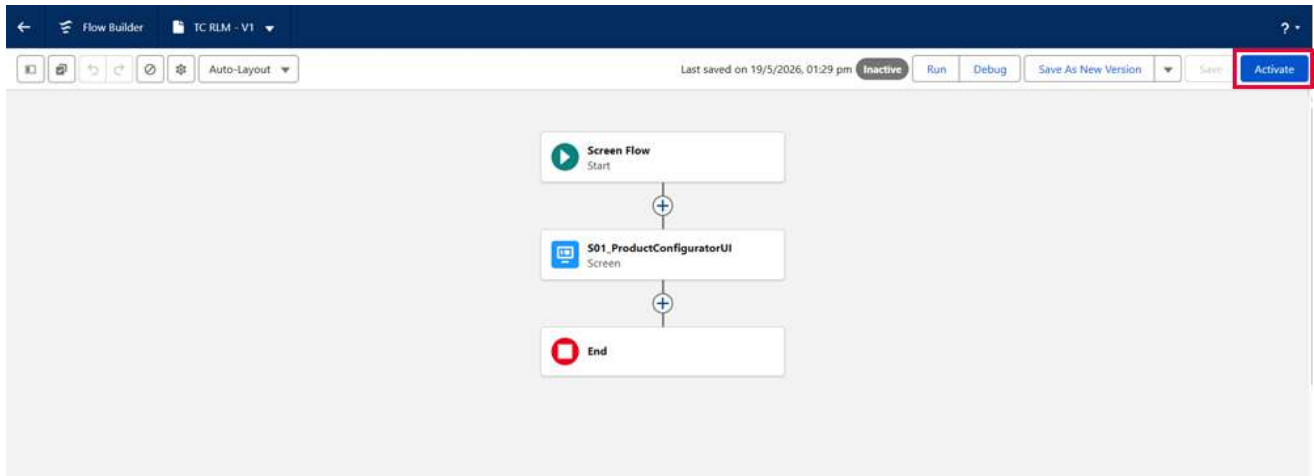
6. In the **Config Popup** panel on the right, set the following properties:
 - a. In the **Product Id** field, select **!S01_DataManager.rootProductId**.
 - b. In the **Quote Id** field, select **!configuratorContext.transactionId**.
 - c. In the **QuoteLine Id** field, select **!configuratorContext.transactionLineId**.



7. Click **Done**, and then click **Save As New Flow**.
8. In the **Save as** dialog box, do the following:
 - a. In the **Flow Label** field, enter **TC RLM**.
 - b. Copy the generated **API name**.
 - c. Click **Save**.



9. On the **Flow Builder** page, click **Activate**.

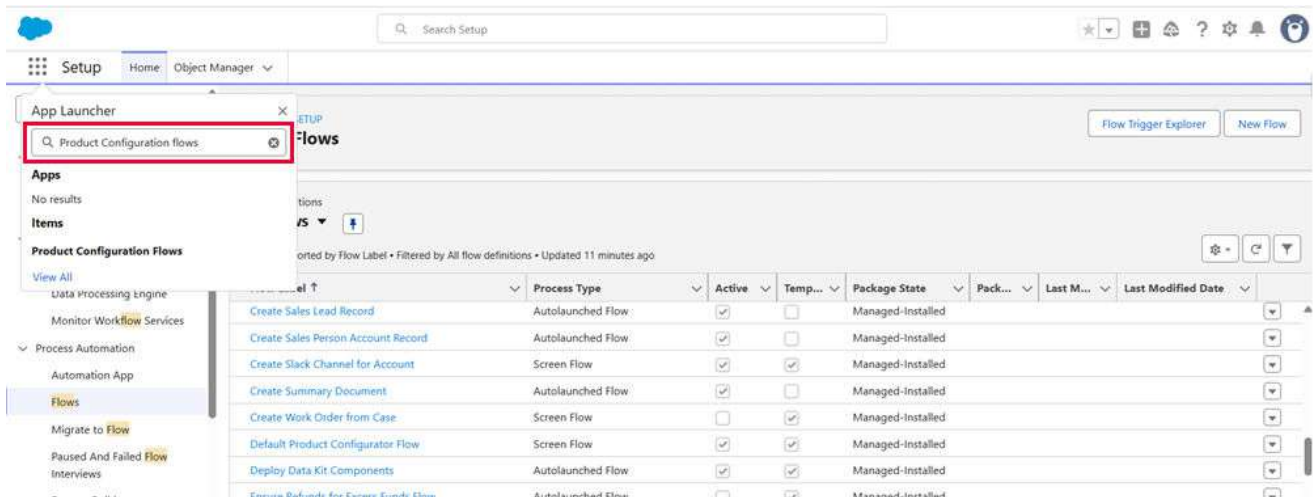


Enable custom configurator

To enable the custom configurator for specific products, assign the product to the TC RLM flow in **Product Configuration Flows**.

Procedure

1. Click **App Launcher** and search for **Product Configuration Flows**.



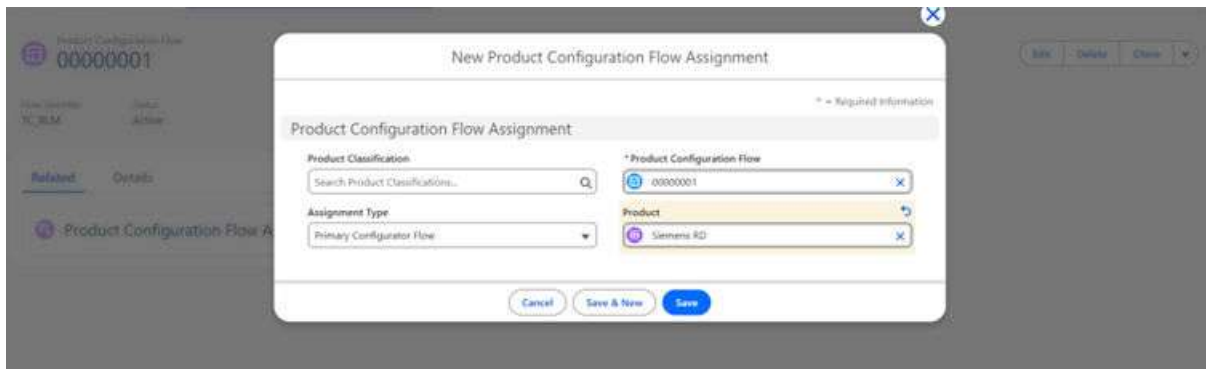
2. Open **Product Configuration Flows** and click **New**.
The **New Product Configuration Flow** dialog box opens.
3. In the **New Product Configuration Flow** dialog box, enter the following information:
 - a. In the **Flow API Name** field, enter **TC_RLM**.
 - b. In the **Status** field, select **Active**.

Note

If you select the **Default** check box, the custom configurator displays for all products.

4. Click **Save**.
5. To view the RLM Configurator only for specific products, open the **Related** tab and click **New**.

6. In the **New Product Configuration Flow Assignment** dialog box, select the product for which you want to enable the custom configurator.



7. Click **Save**.

3. Contact and Support

For technical support, you can email the following experts:

1. **Name:** Bhupendrasing Patil
Email: bhupendrasing.patil@siemens.com
2. **Name:** Chetan Attarde
Email: chetan.attarde@siemens.com