Teamcenter Configure & Quote - Installation and Setup Guide

SIEMENS

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Table of Contents

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

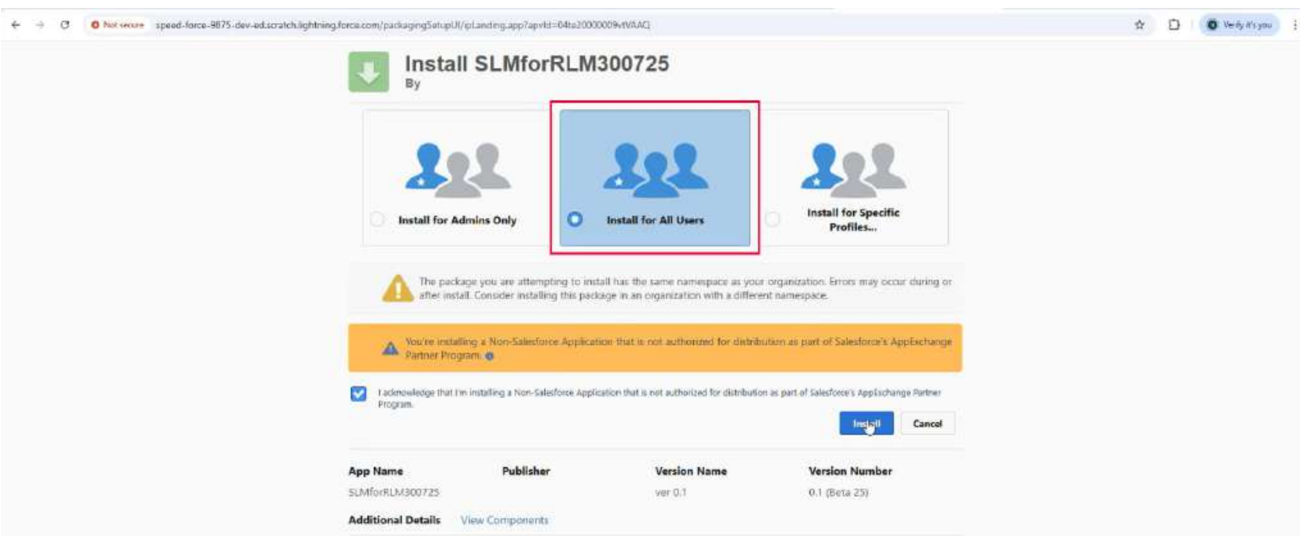
Before proceeding with the installation, ensure that you meet the following prerequisites:

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**.

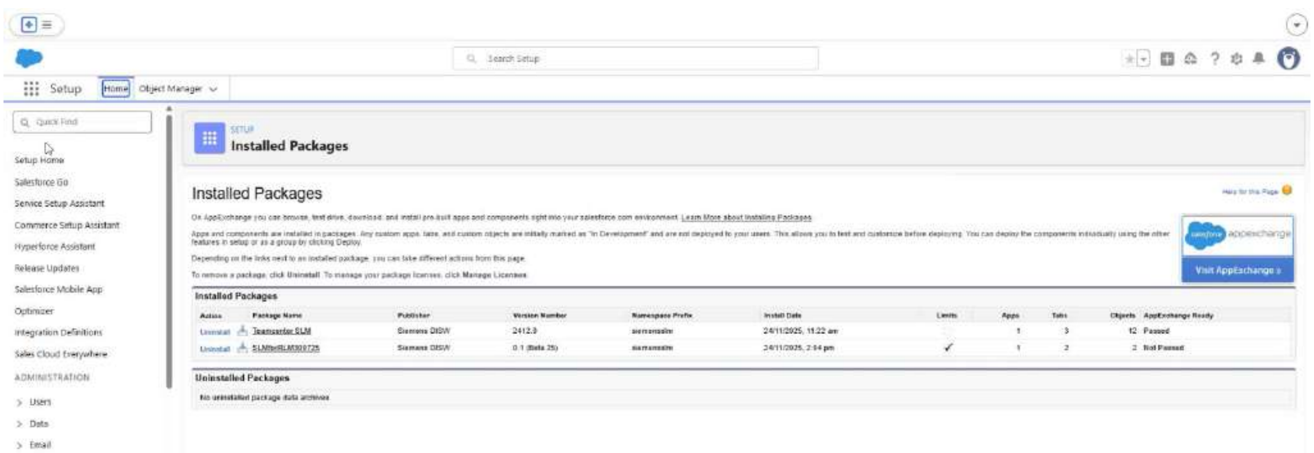


The installation process begins.

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

Tip

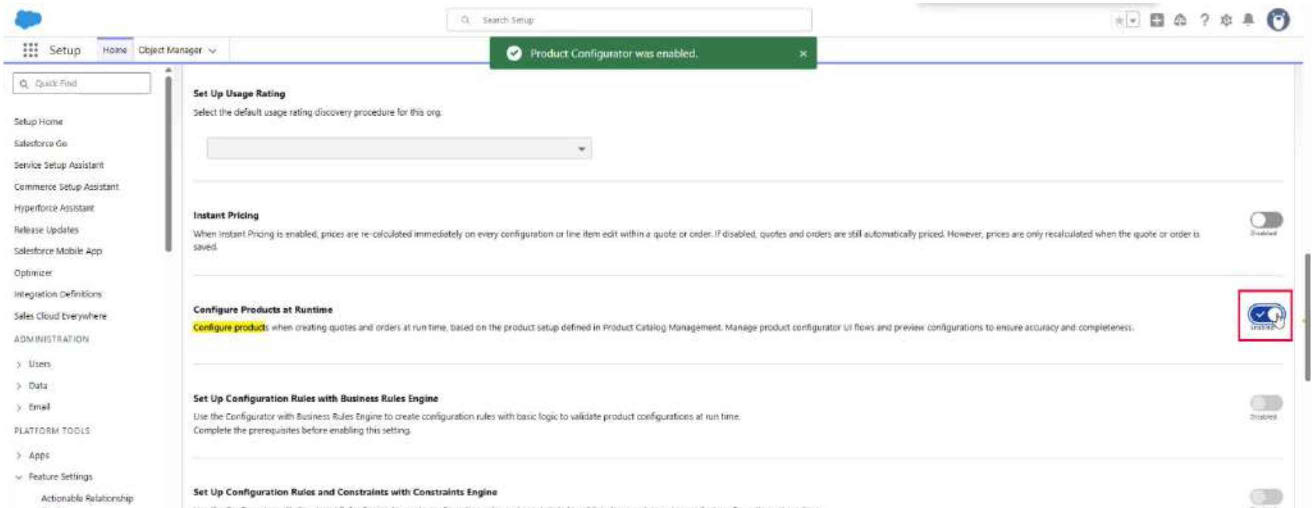
You can also find the **Installed Packages** page in the **Setup** menu.



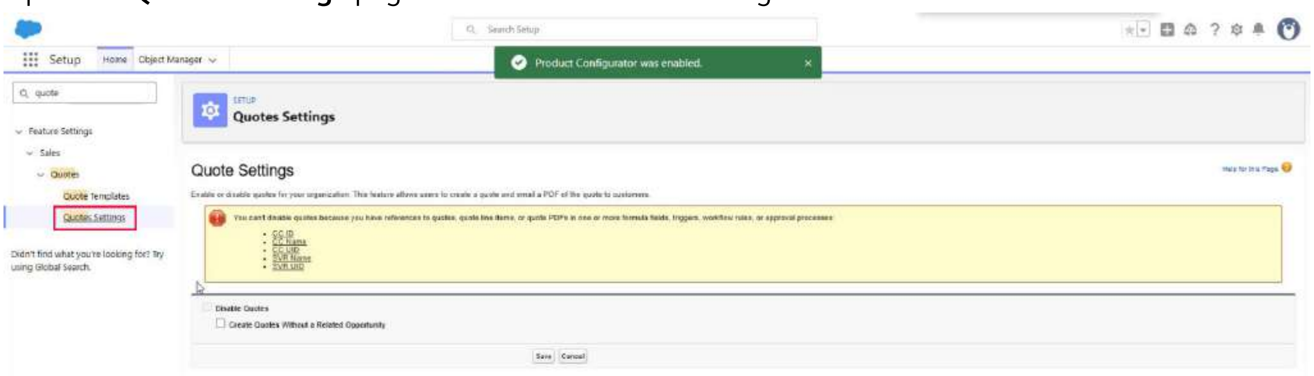
Configure Salesforce revenue, quotes, and order settings

Procedure

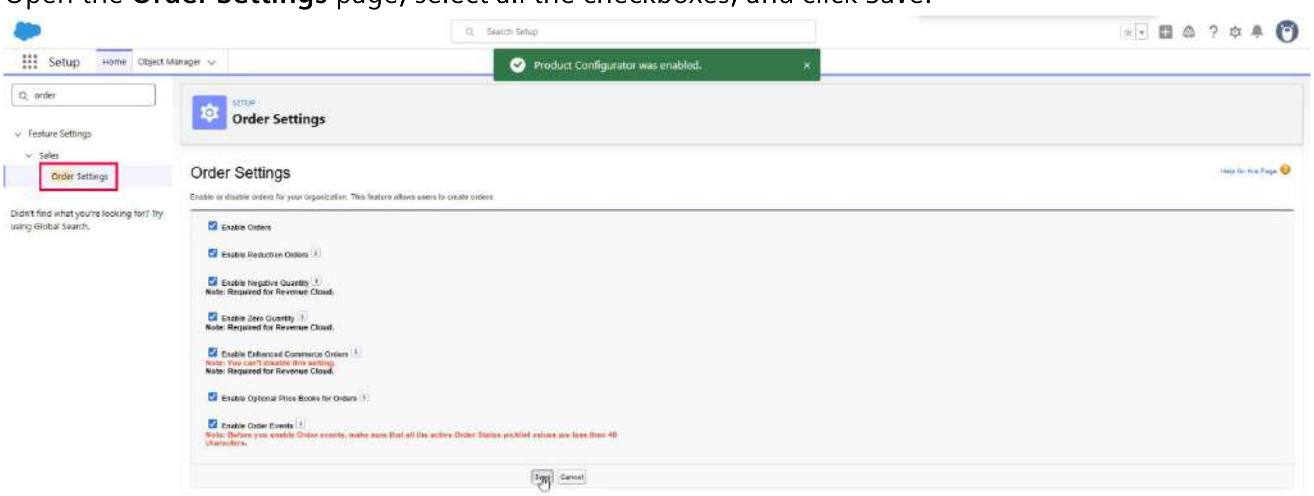
1. Open the **Revenue Settings** page and enable the **Configure Products Runtime** option.



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



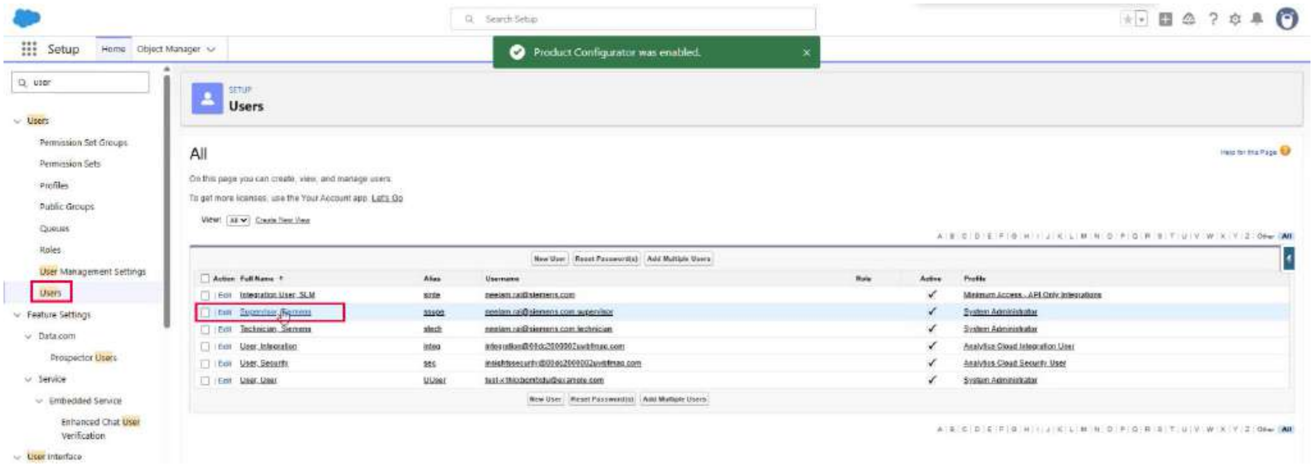
3. Open the **Order Settings** page, select all the checkboxes, and click Save.



Assign Permission Sets and Licenses for supervisor user

Procedure

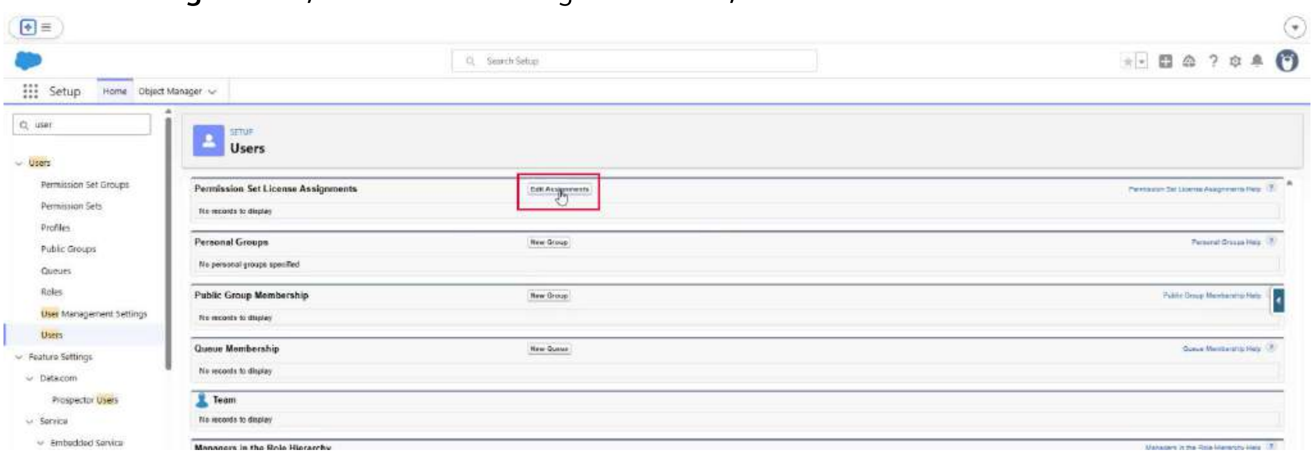
1. On the **Users** page, open the **Supervisor** user by clicking on their full name.



The user details open.

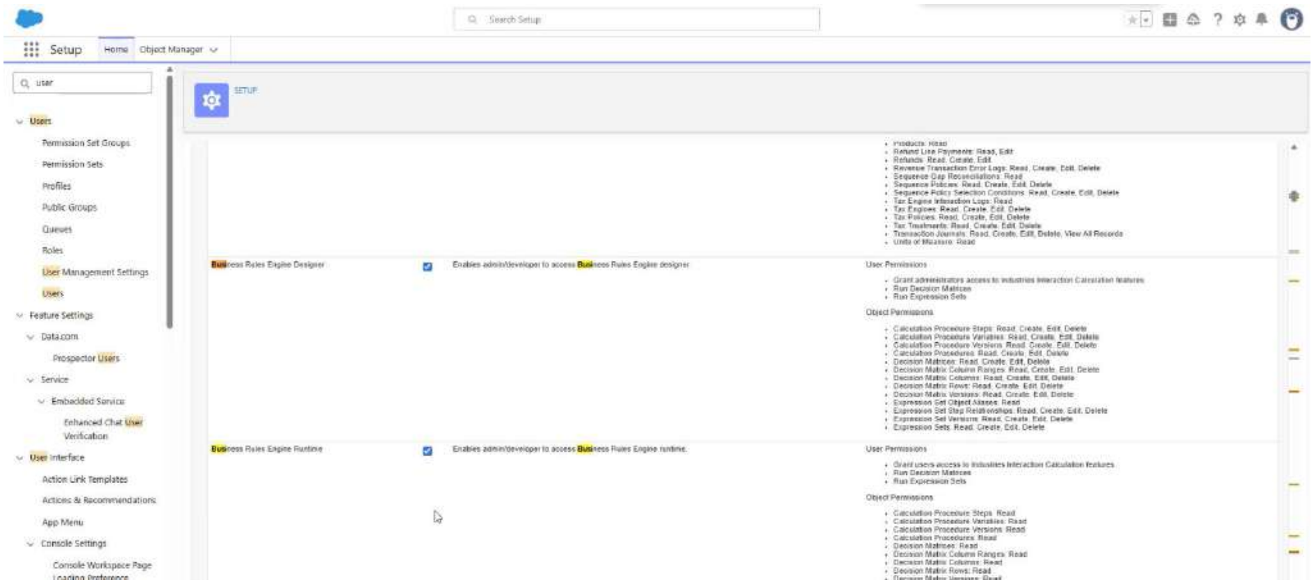
2. Click **Permission Set License Assignments** to view the permission set license details.

3. Click **Edit Assignments**, select the following checkboxes, and click **Save**.

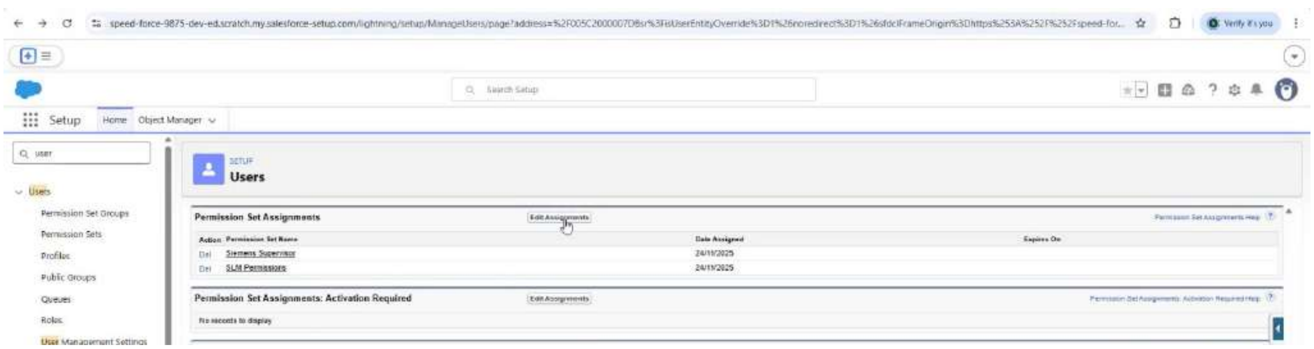


- **Business Rules Engine Designer**
- **Business Rules Engine Runtime**
- **Contract Lifecycle Management User**
- **Product Catalog Management Administrator**
- **Product Catalog Management Viewer**
- **Product Configuration User**
- **Product Discovery User**
- **Revenue Cloud User**

- **Salesforce Pricing Design Time**
- **Salesforce Pricing Design Run Time**

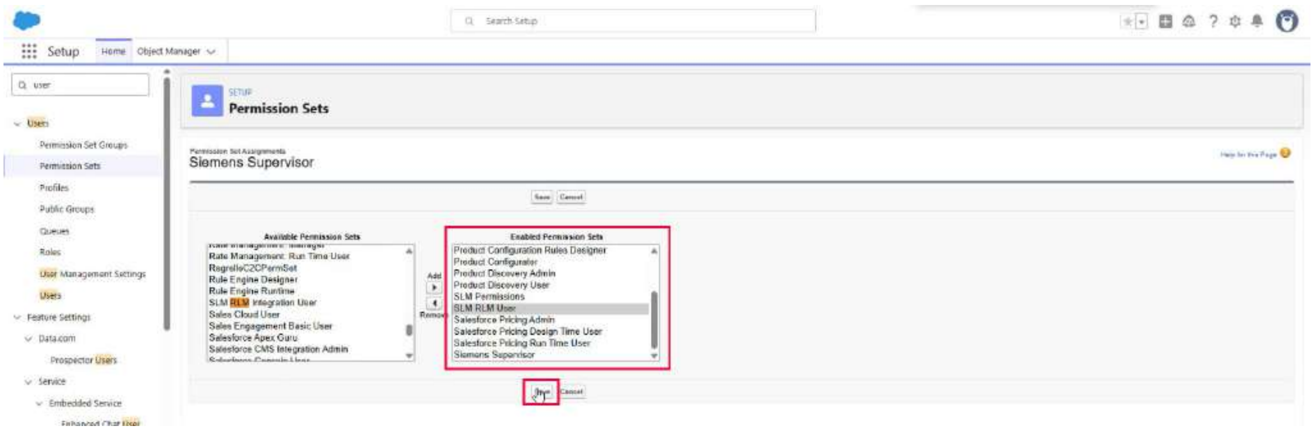


4. Click **Permission Set Assignment** to open the permission set details.
5. Click **Edit Assignments** on the **Permission Set** page, add the following permission sets, and click **Save**.



- **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**

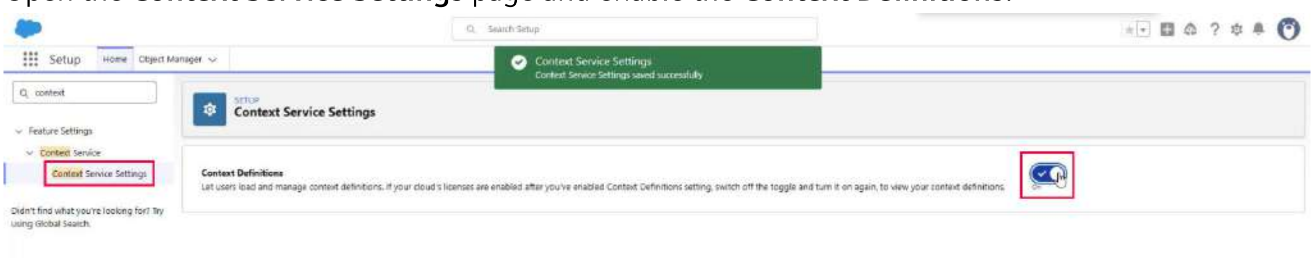
- **Create Orders from Quotes**
- **Product Configurator**
- **Assetize Order**
- **SLM RLM User**



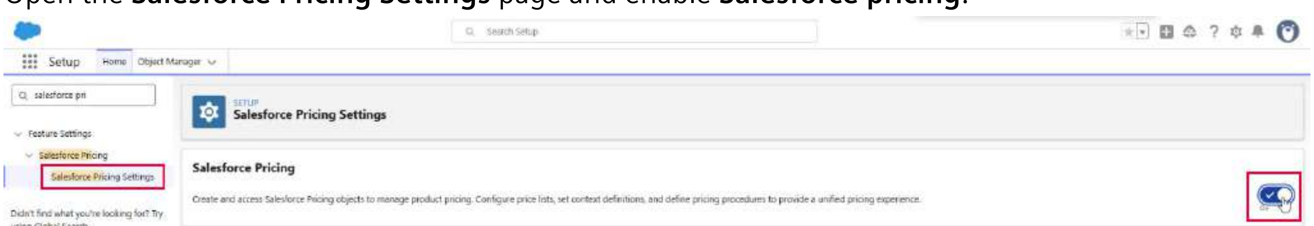
Enable context service and Salesforce pricing

Procedure

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



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

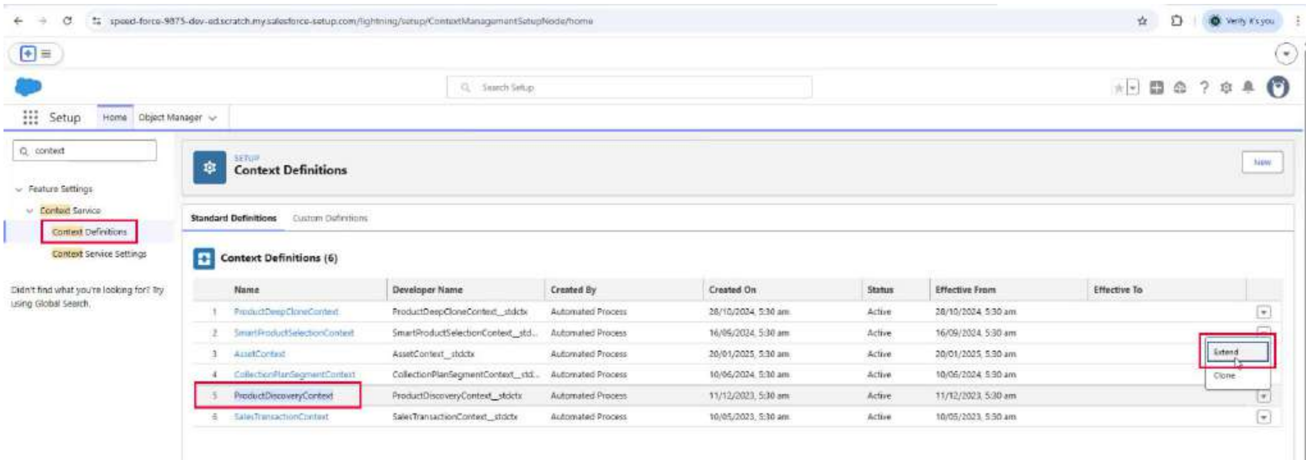


> **Note**
>
> Refresh the page if you do not see the Salesforce Pricing setting.

Extend and map product discovery context

Procedure

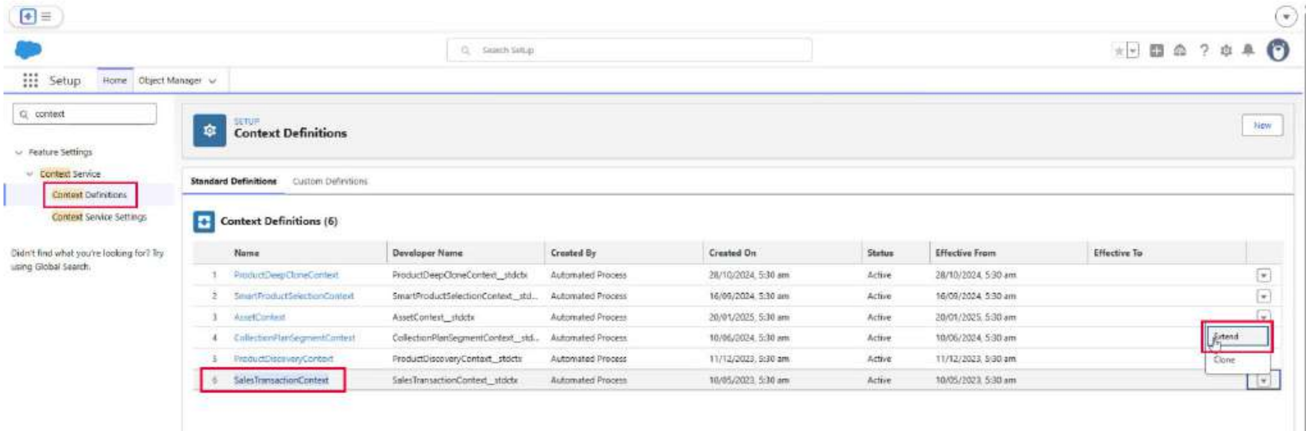
1. Open the **Context Definitions** page.
2. From the **Context Definitions** list, for **ProductDiscoveryContext**, select **Extend** from the drop-down list.



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

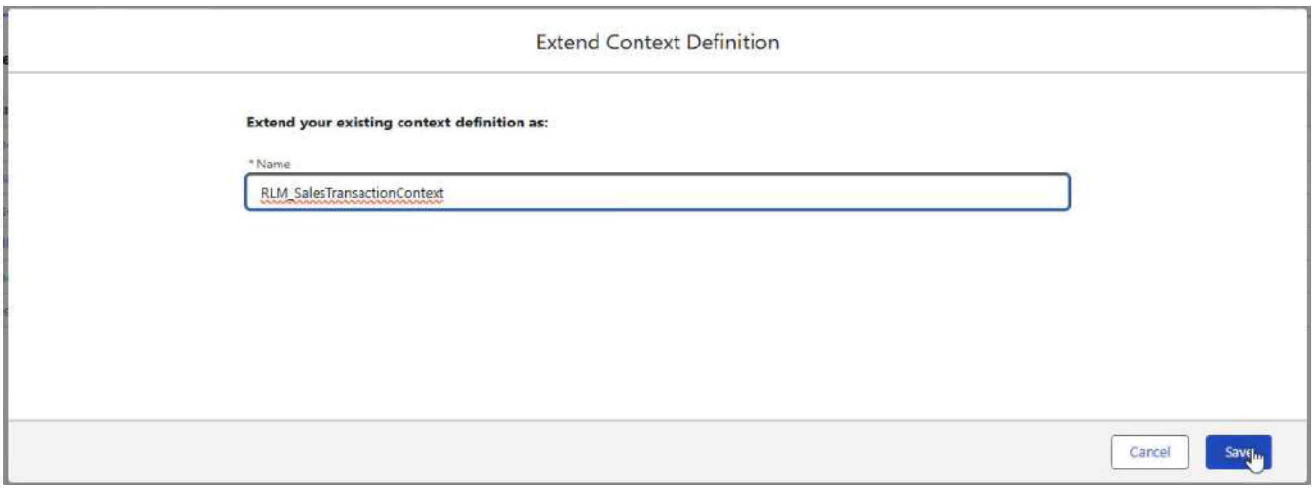
3. In the **Extend Context Definition** dialog box, enter the name as **RLM_ProductDiscoveryContext**, and click **Save**.

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

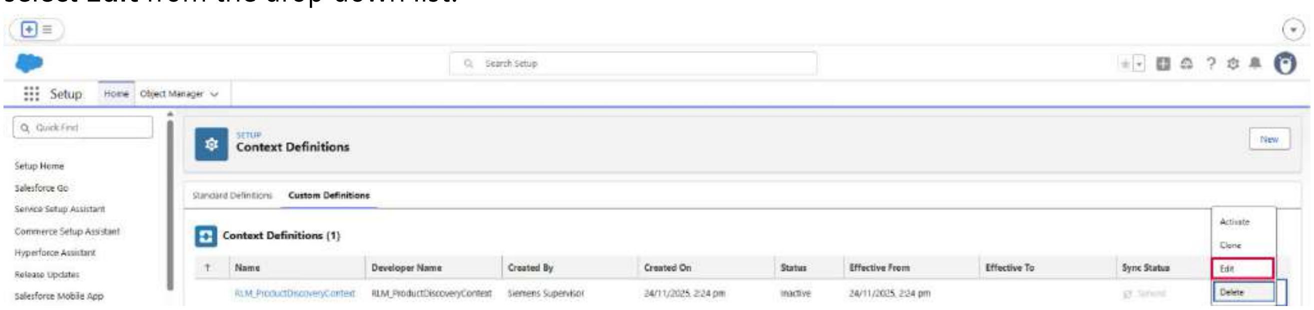


The **Extend Context Definition** dialog box opens.

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

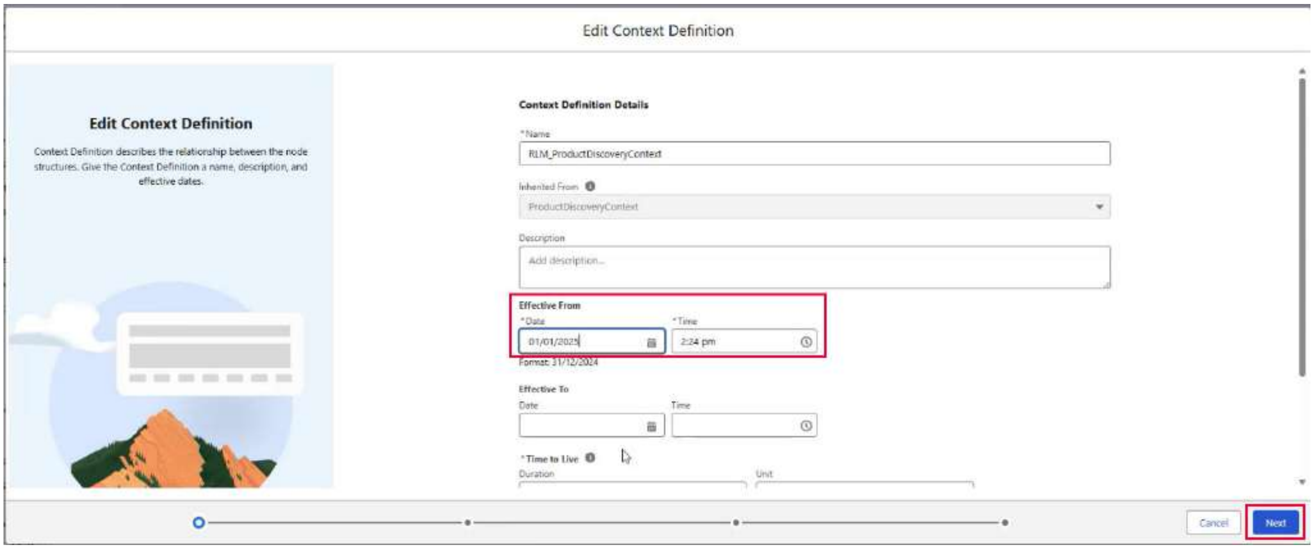


6. You can now navigate to the **Customs Definitions** tab, and for **RLM_ProductDiscoveryContext**, select **Edit** from the drop-down list.



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

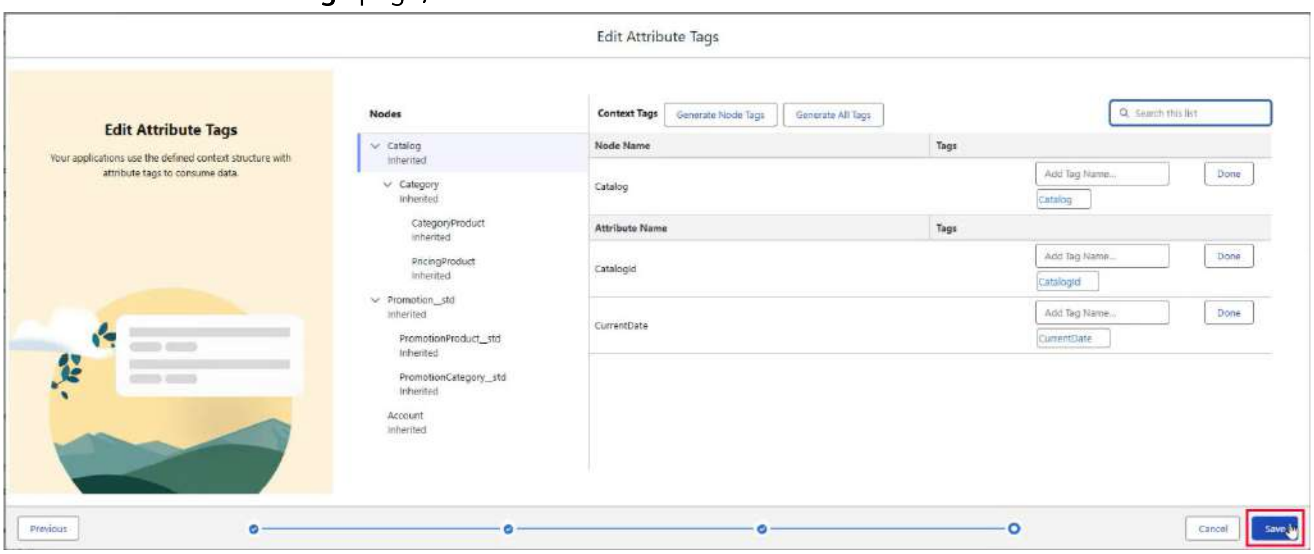
7. In the **Edit Context Definition** dialog box, set the **Effective From Date** and click **Next**.



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

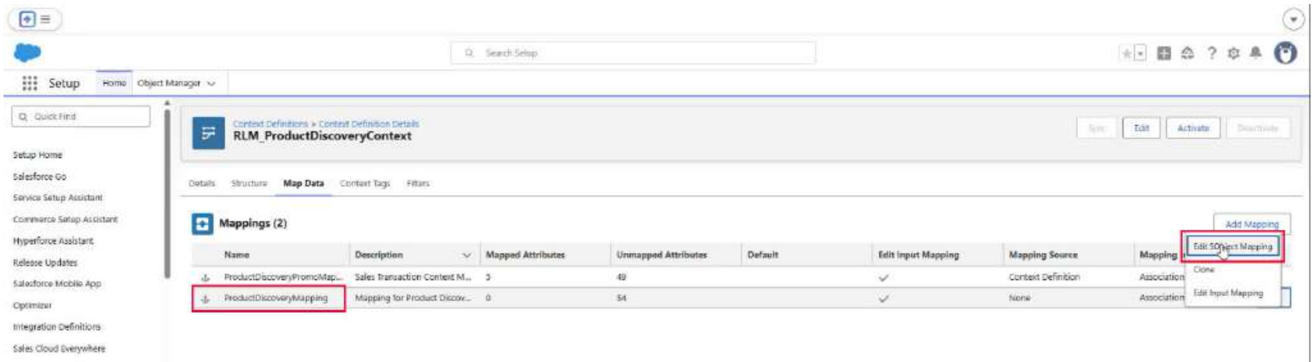
> **Note**
>
> You do not need to make any changes on the Edit Structure page and the Edit Attribute page, so click Next on these pages.

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



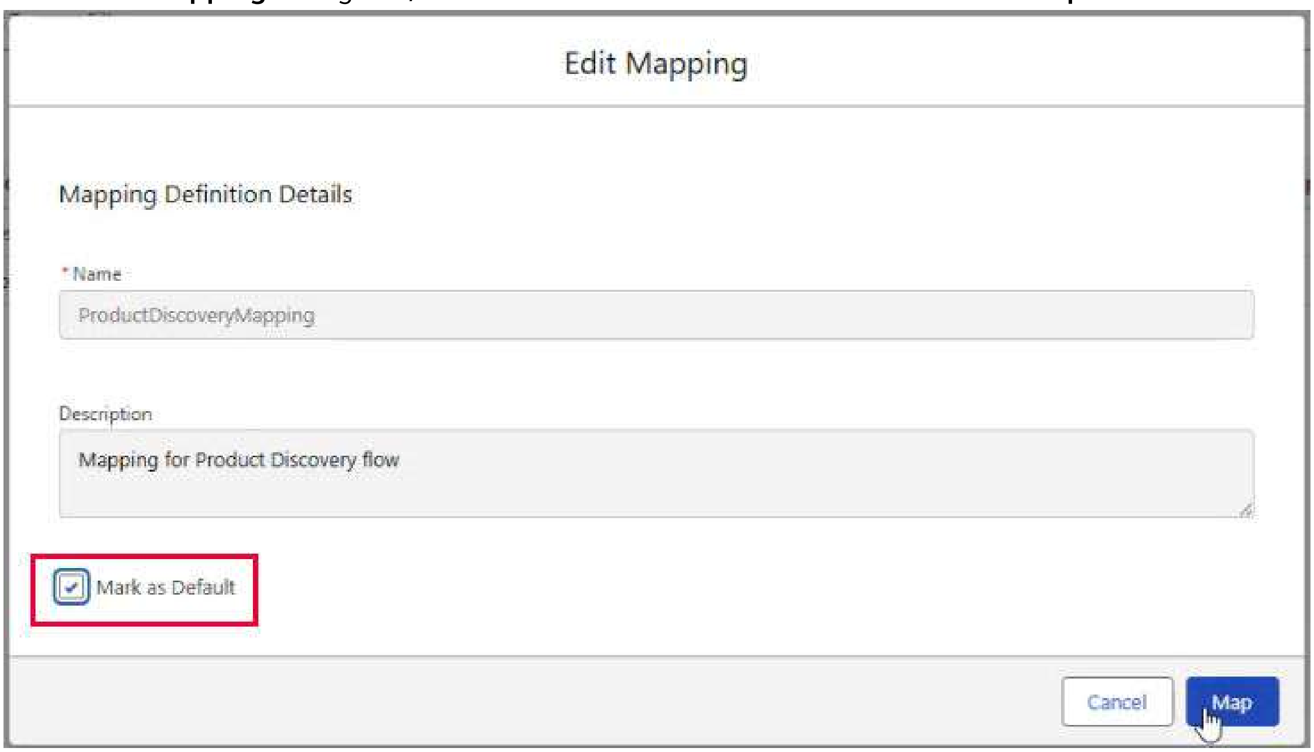
10. From the **Context Definitions** list, select **RLM_ProductDiscoveryContext** and go to the **Map Data** tab.

11. In the **Map Data** tab, for **ProductDiscoveryMapping**, select **Edit SObject Mapping** from the drop-down list.

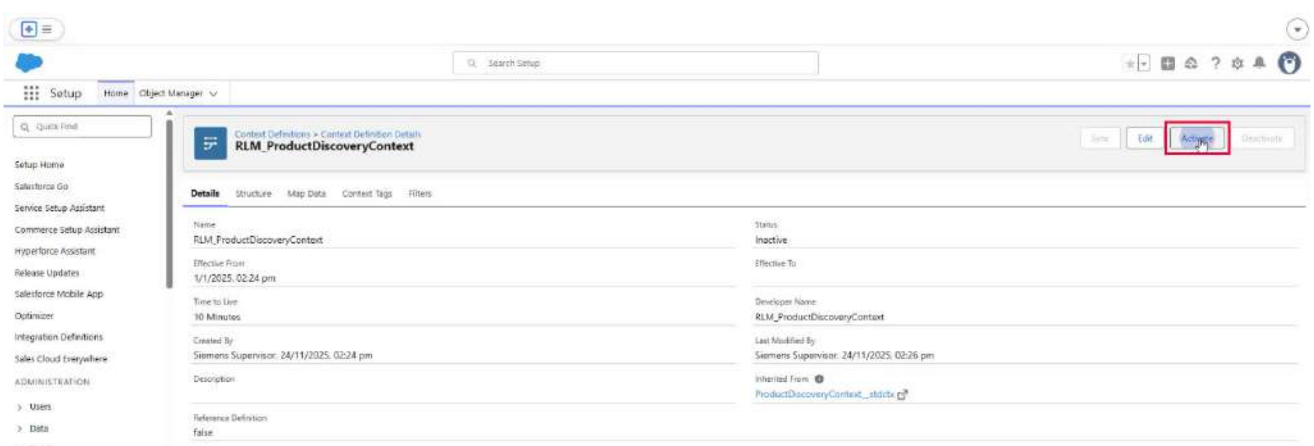


The **Edit Mapping** dialog box opens.

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



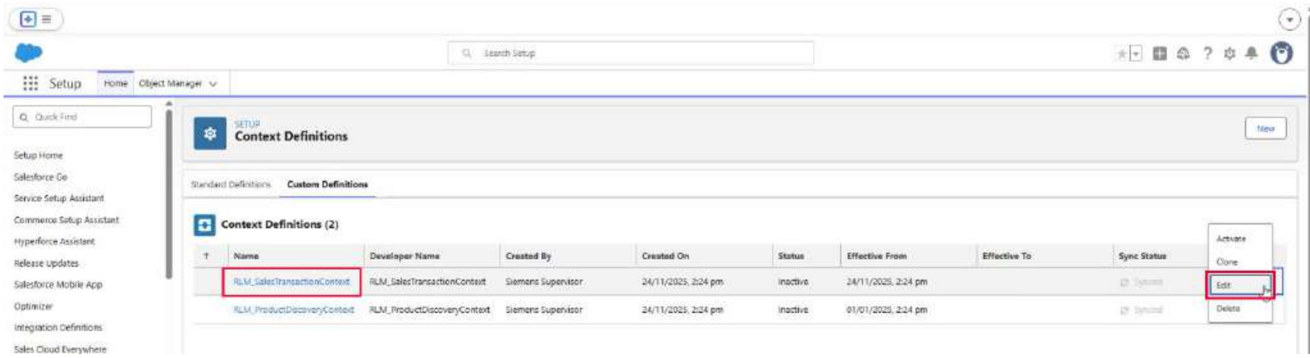
13. Click **Activate**.



Extend and map sales transaction context

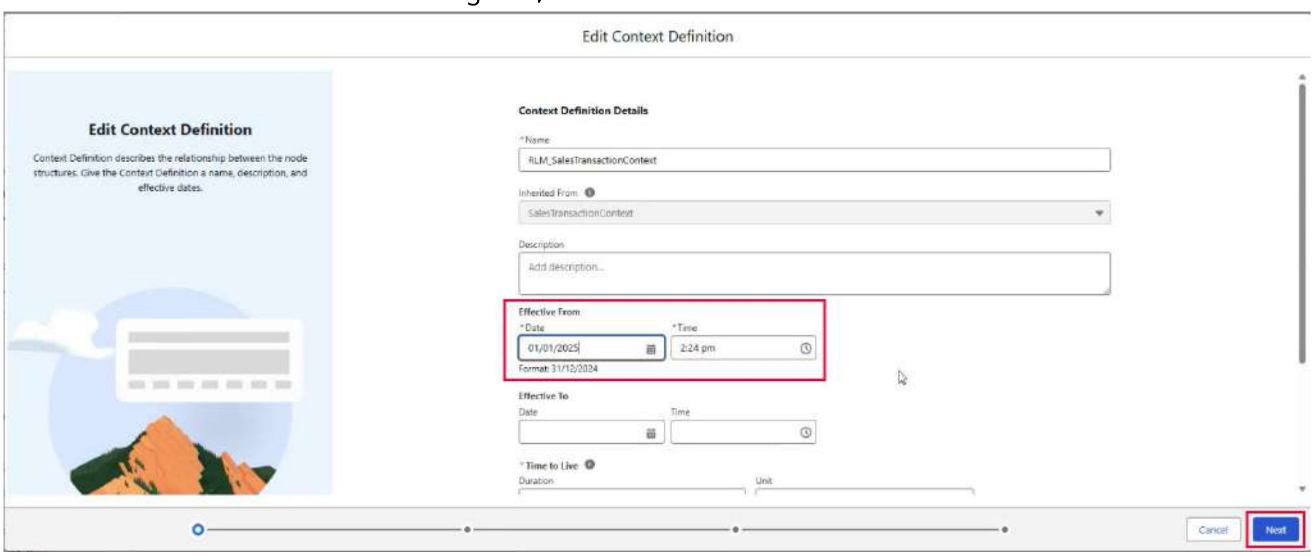
Procedure

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.

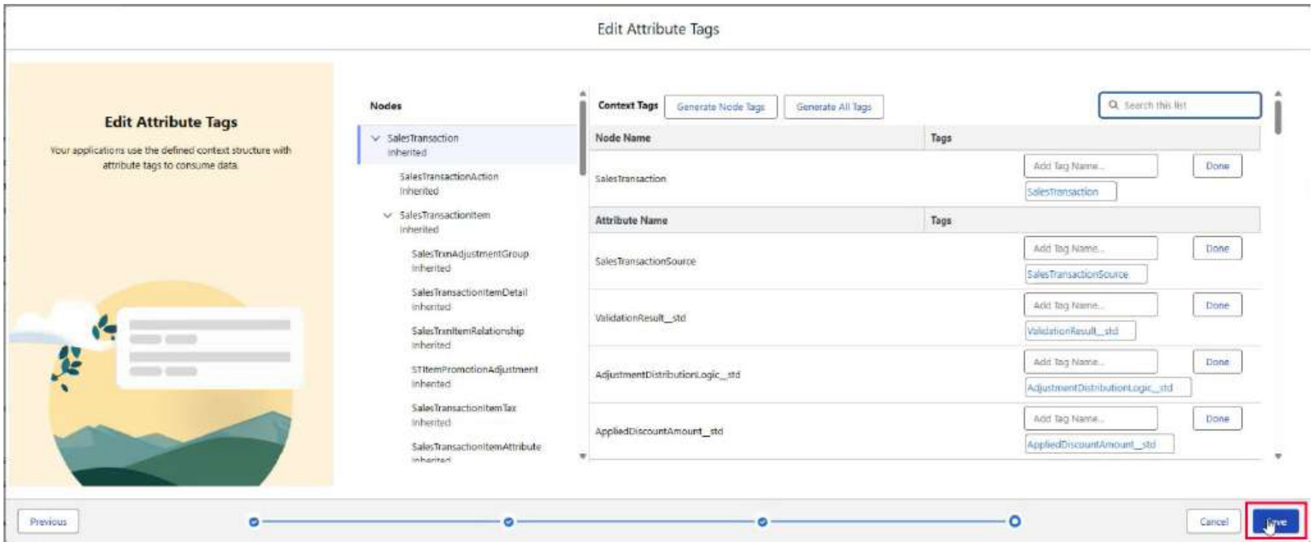
3. In the **Edit Context Definition** dialog box, set the **Effective From Date** and click **Next**.



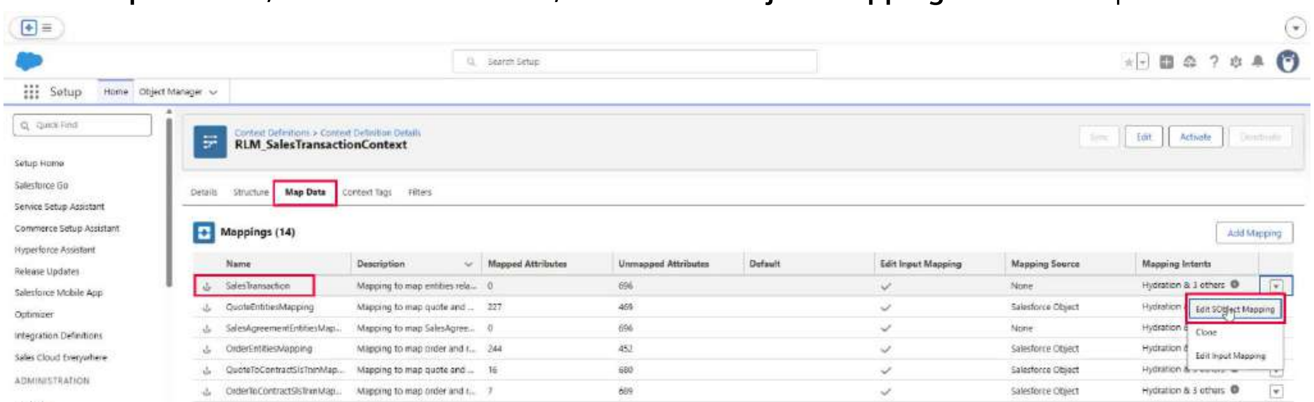
4. Click **Next** until you reach the **Edit Attribute Tags** page.

> **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**.

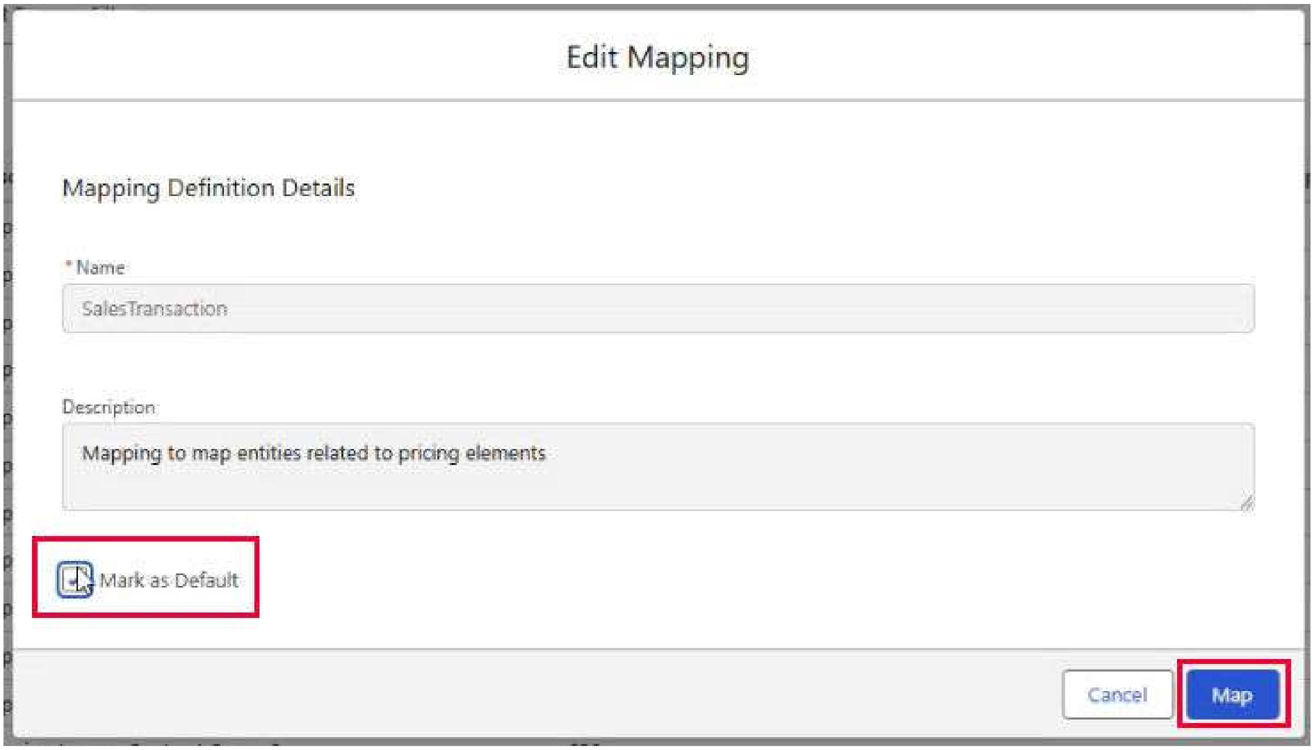


6. From the **Context Definitions** list, select **RLM_SalesTransactionContext** and go to the **Map Data** tab.
7. In the **Map Data** tab, for **SalesTransaction**, select **Edit SObject Mapping** from the drop-down list.

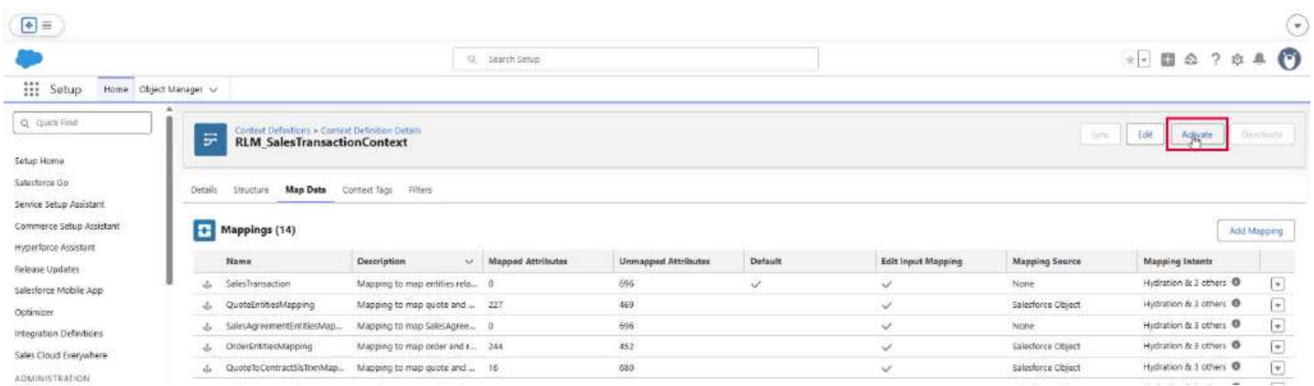


The **Edit Mapping** dialog box opens.

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



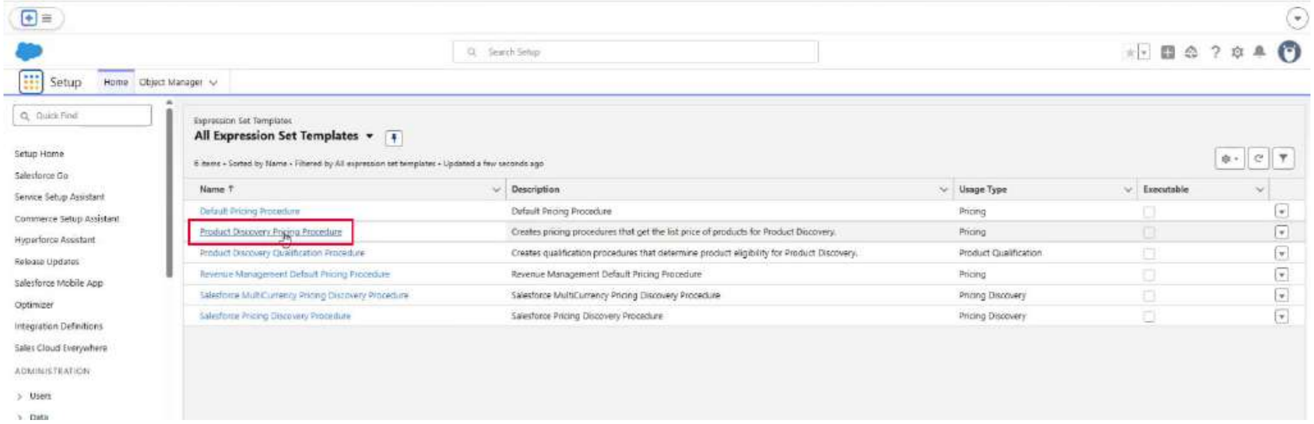
9. Click **Activate**.



Configure expression set templates and pricing procedures

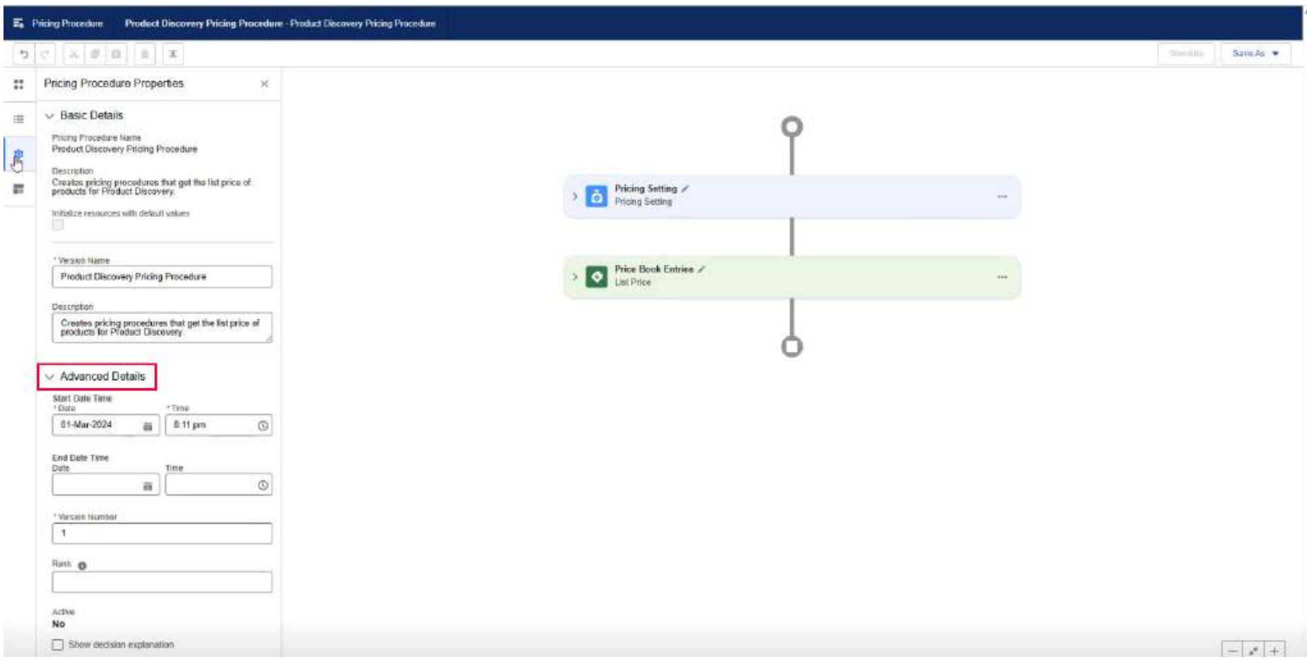
Procedure

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

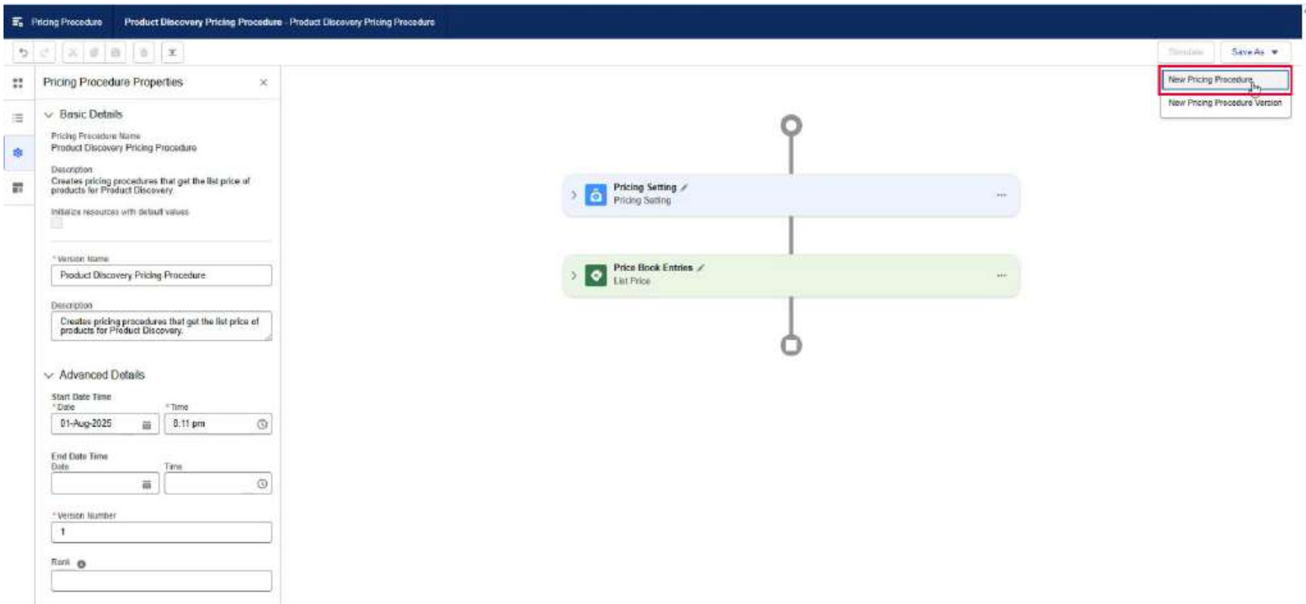


2. On the **Pricing Procedure** page, click **Settings**.
   The **Pricing Procedure Properties** panel opens.

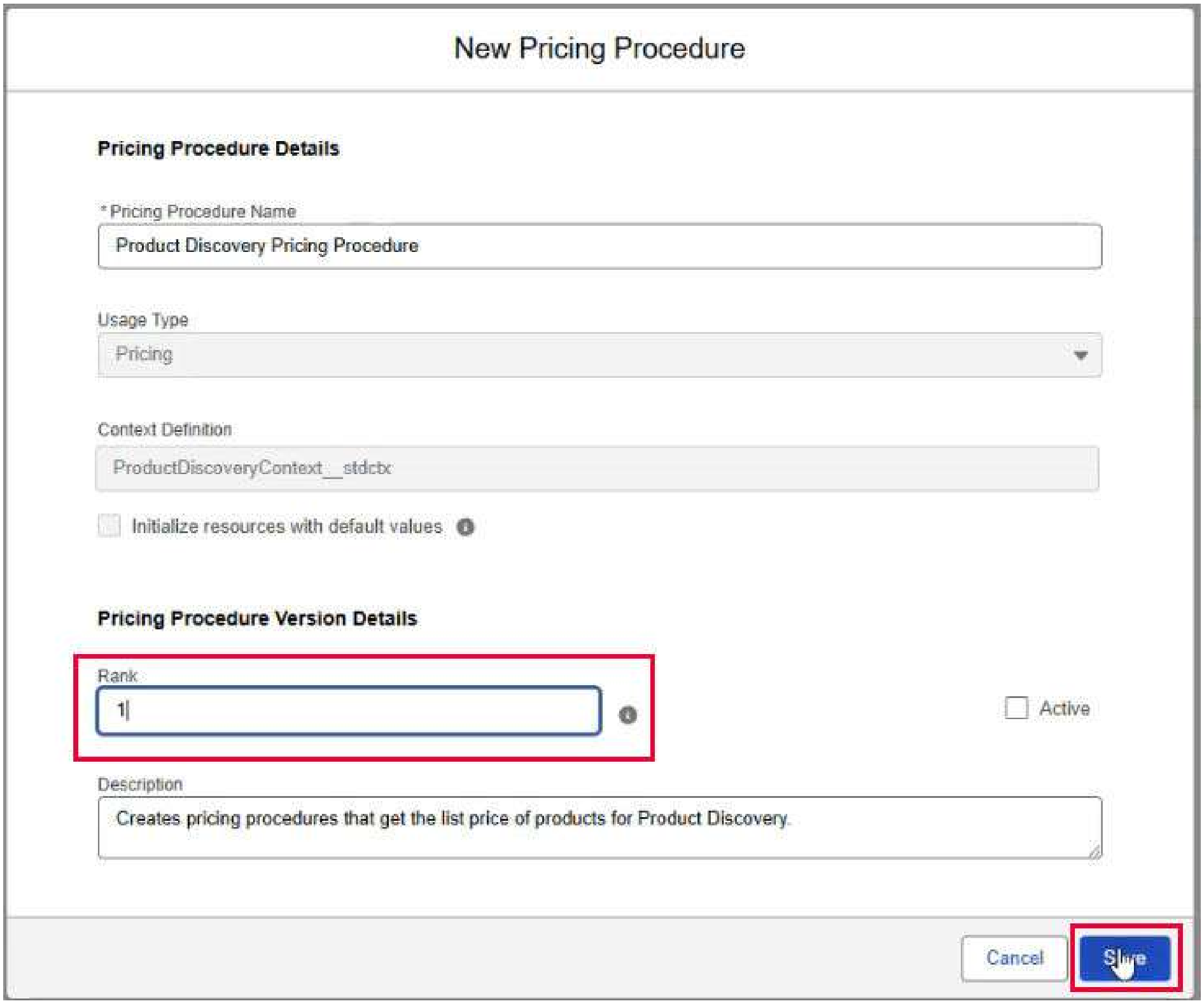
3. In the **Pricing Procedure Properties** panel, go to the **Advanced Details** section and set the **Start Date**.



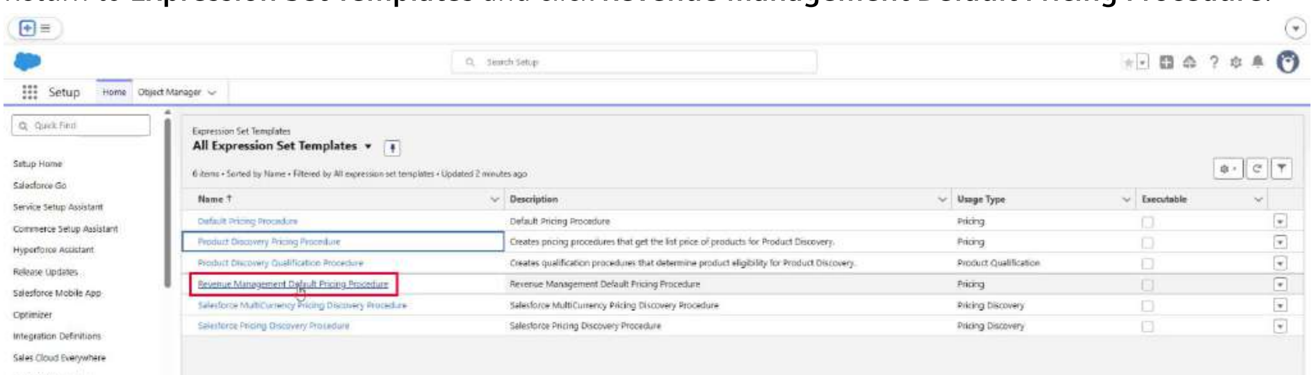
4. Choose **Save As→New Pricing Procedure**.



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

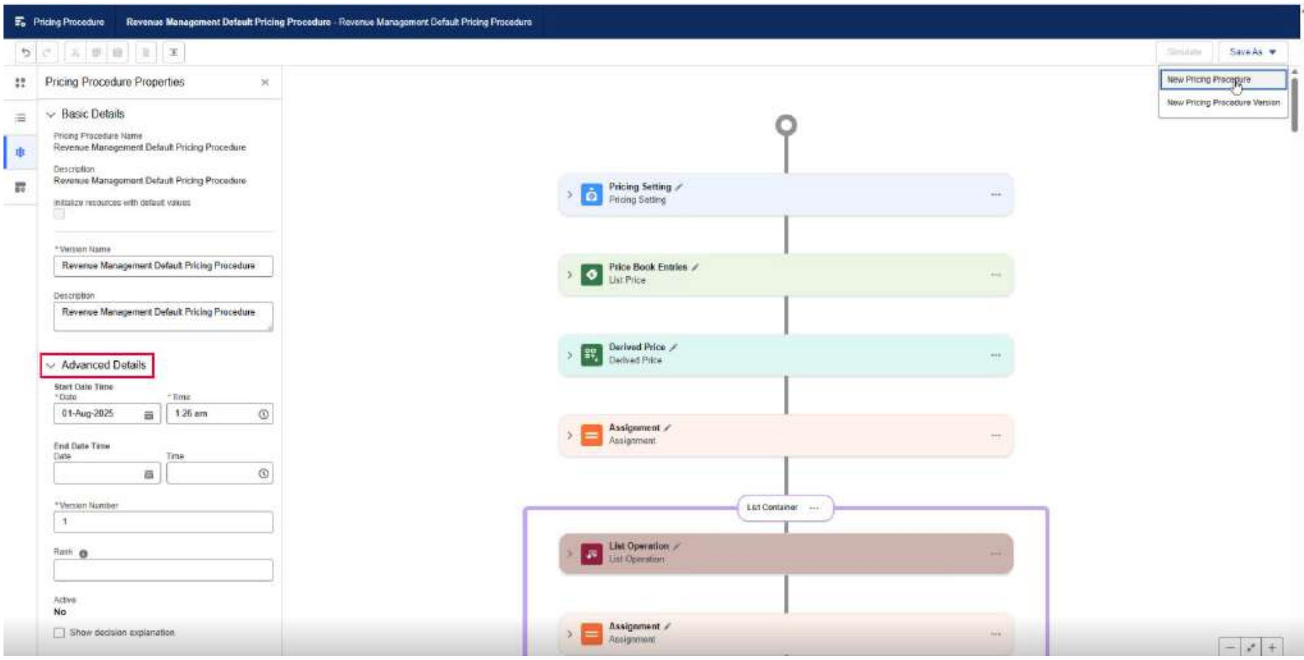


6. Return to **Expression Set Templates** and click **Revenue Management Default Pricing Procedure**.

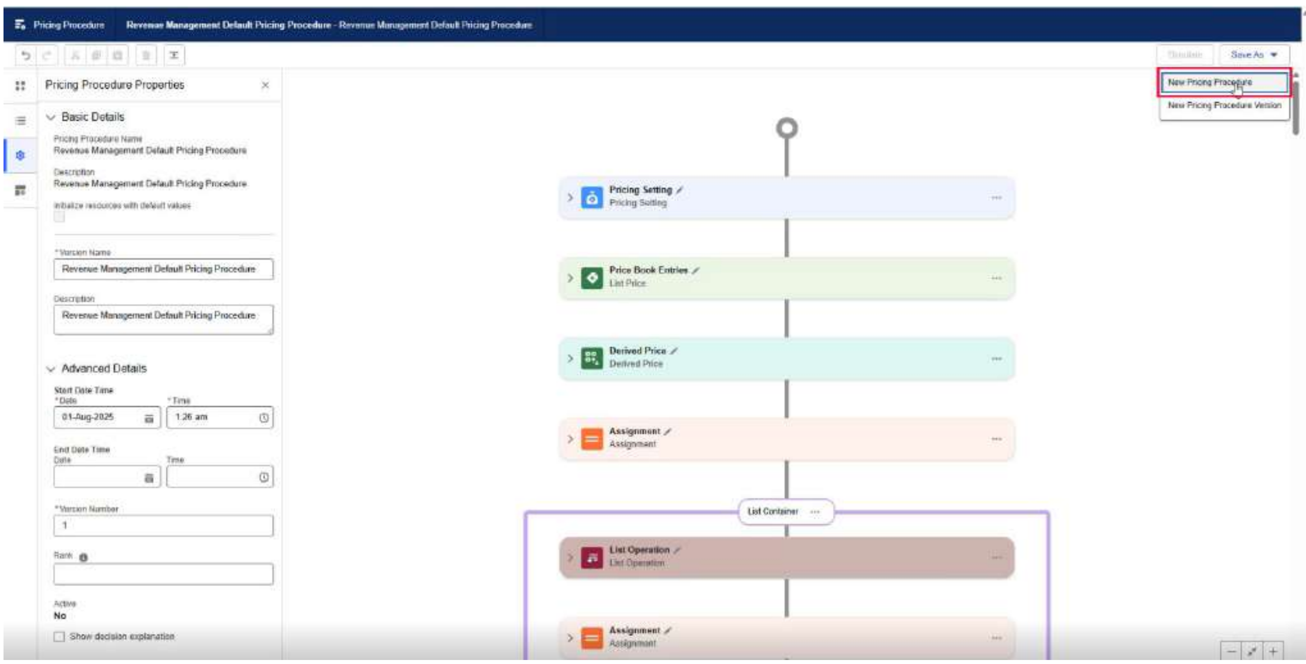


7. On the **Pricing Procedure** page, click **Settings**.
   The **Pricing Procedure Properties** panel opens.

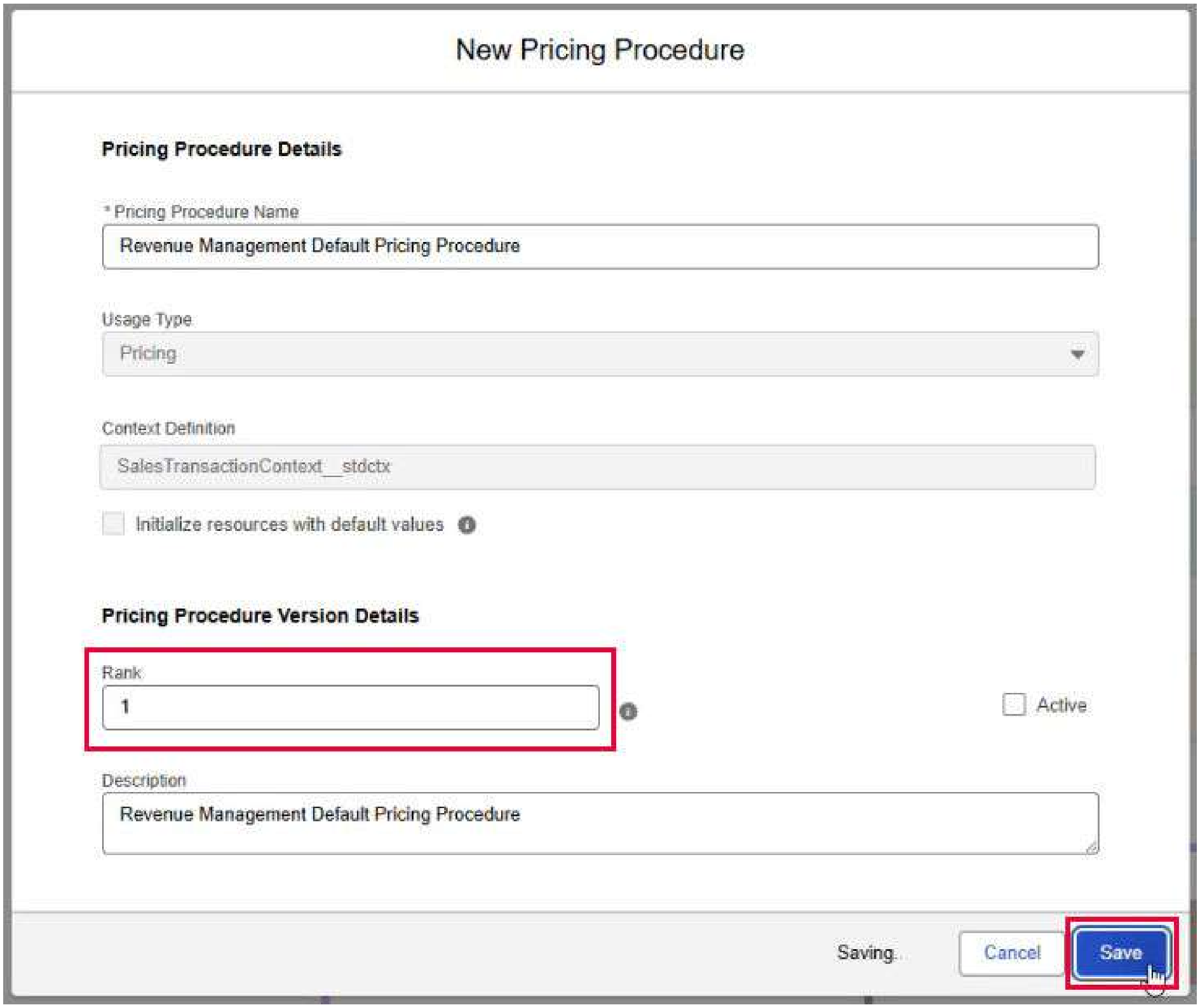
8. In the **Pricing Procedure Properties** panel, go to the **Advanced Details** section and set the **Start Date**.



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



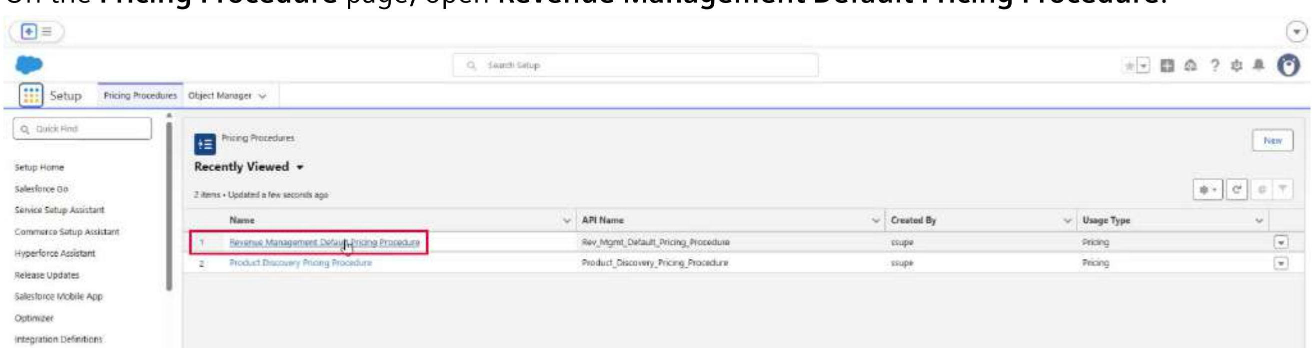
10. In the **New Pricing Procedure** dialog box, add **Rank** as 1, and then click **Save**.



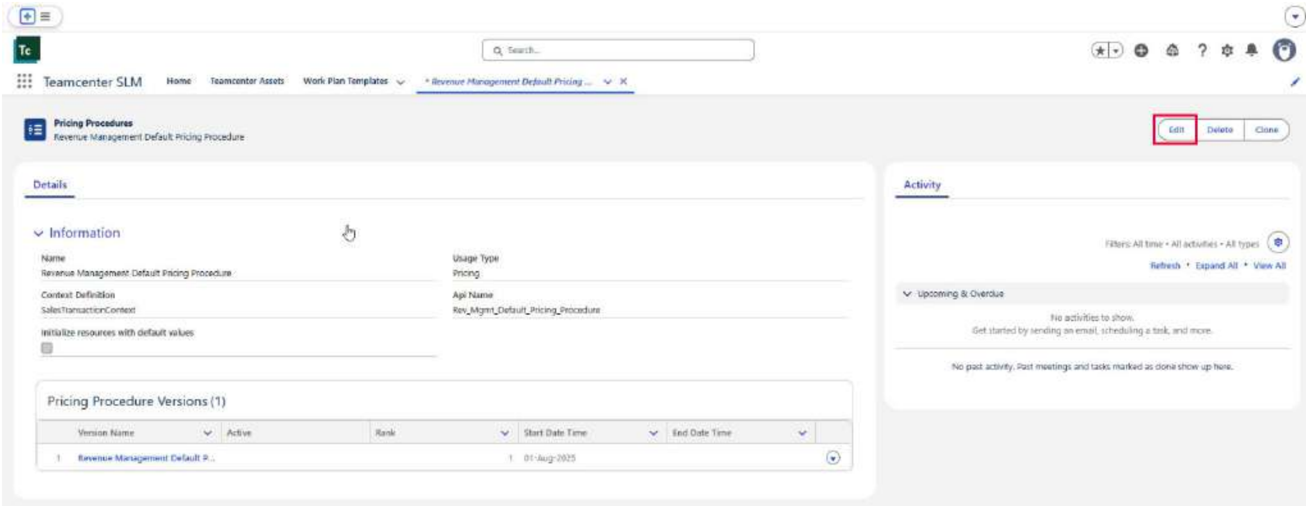
Execute pricing procedures with context definitions

Procedure

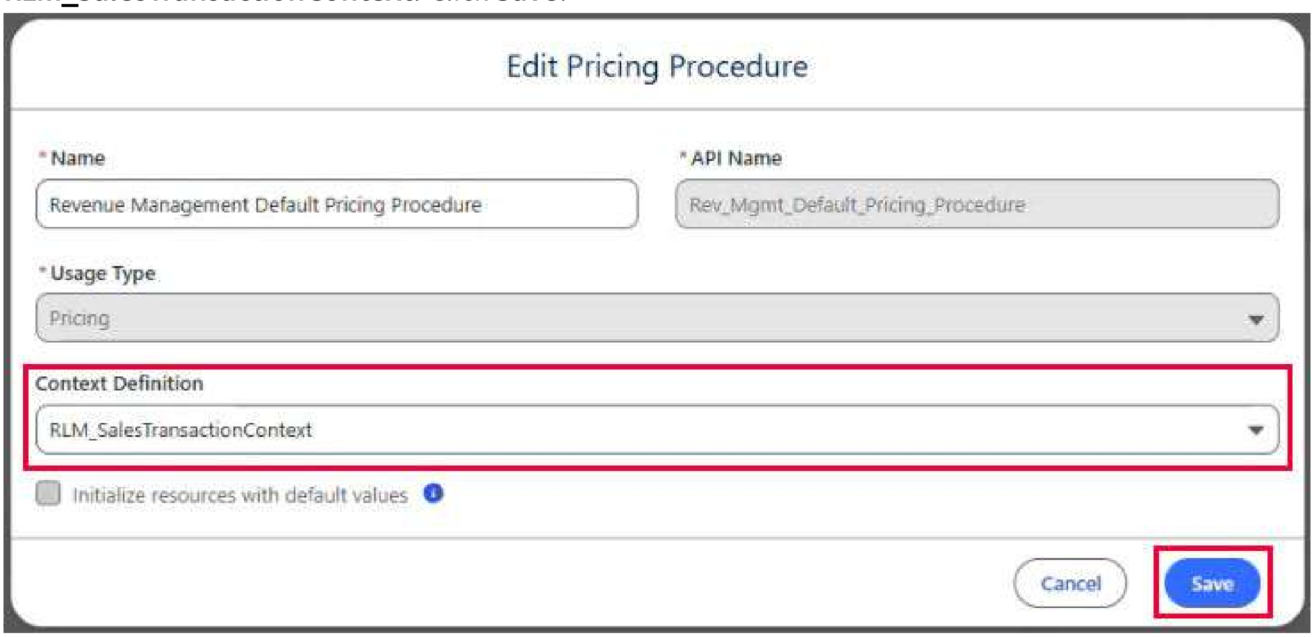
1. On the **Pricing Procedure** page, open **Revenue Management Default Pricing Procedure**.



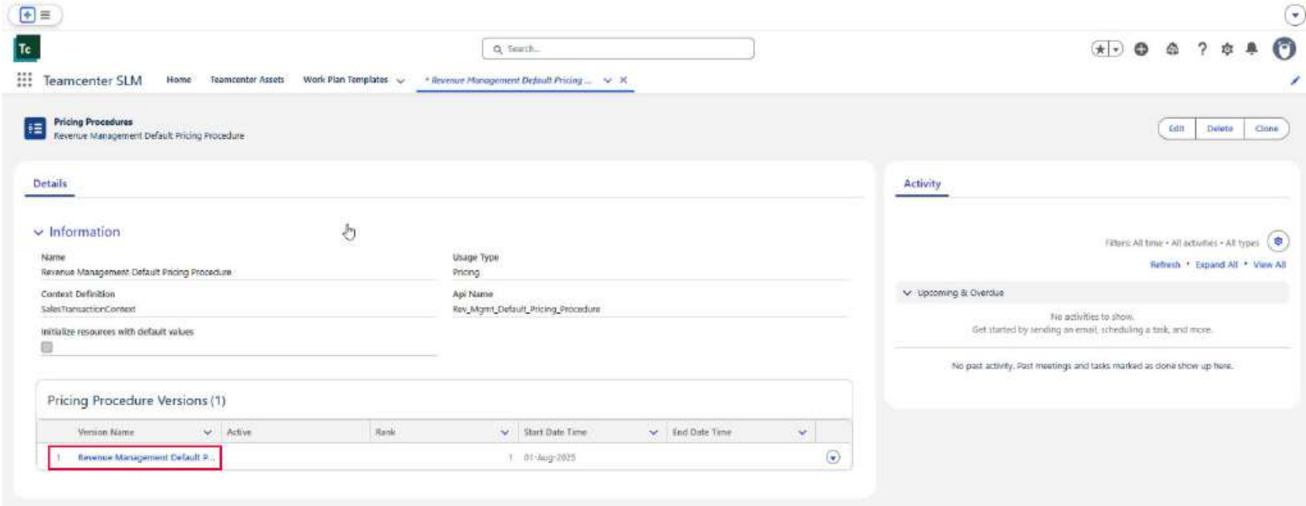
2. Click **Edit**.



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

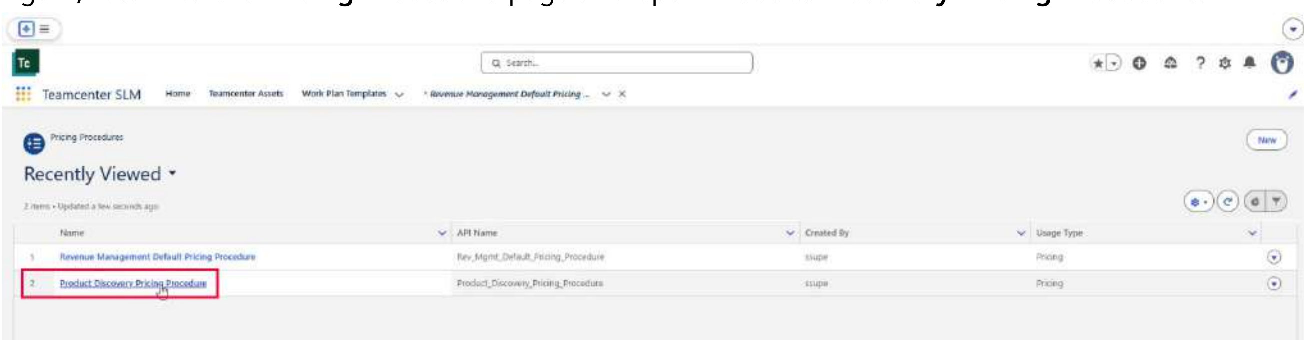


4. On the **Pricing Procedure** page, under **Pricing Procedure Versions** table, click **Revenue Management Default Pricing Procedure**.

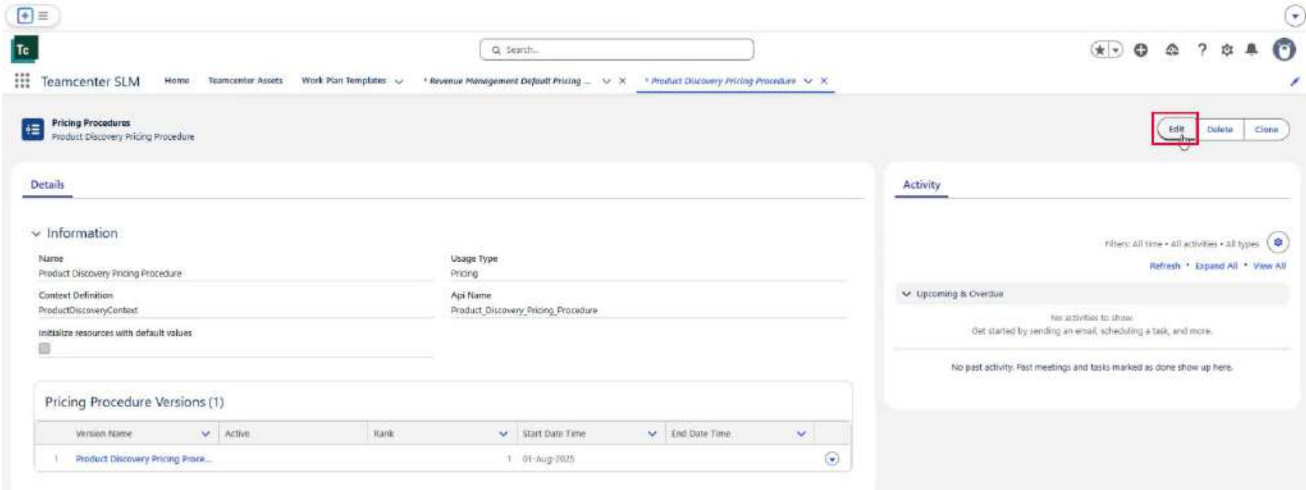


5. Click **Activate**.

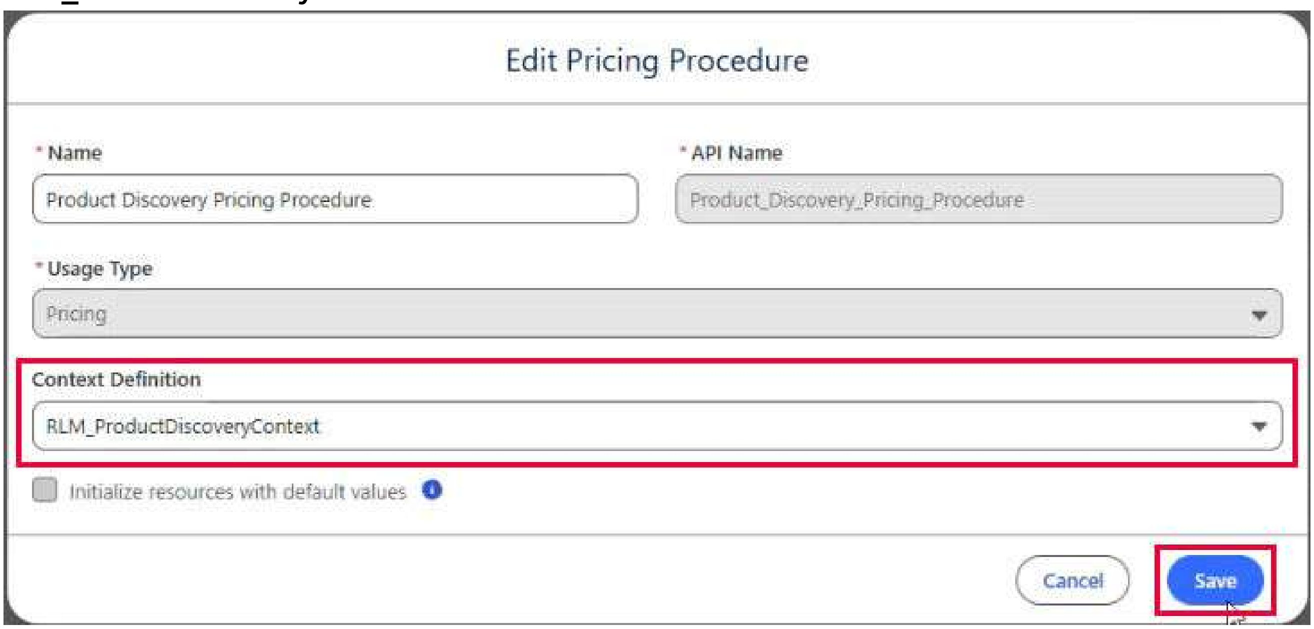
6. Again, return to the **Pricing Procedure** page and open **Product Discovery Pricing Procedure**.



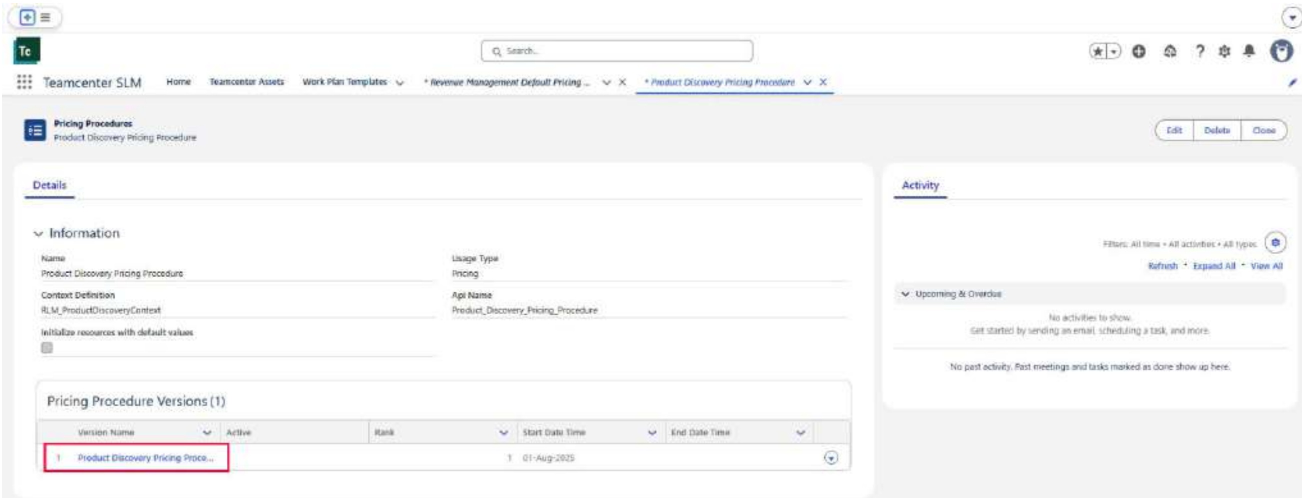
7. Click **Edit**.



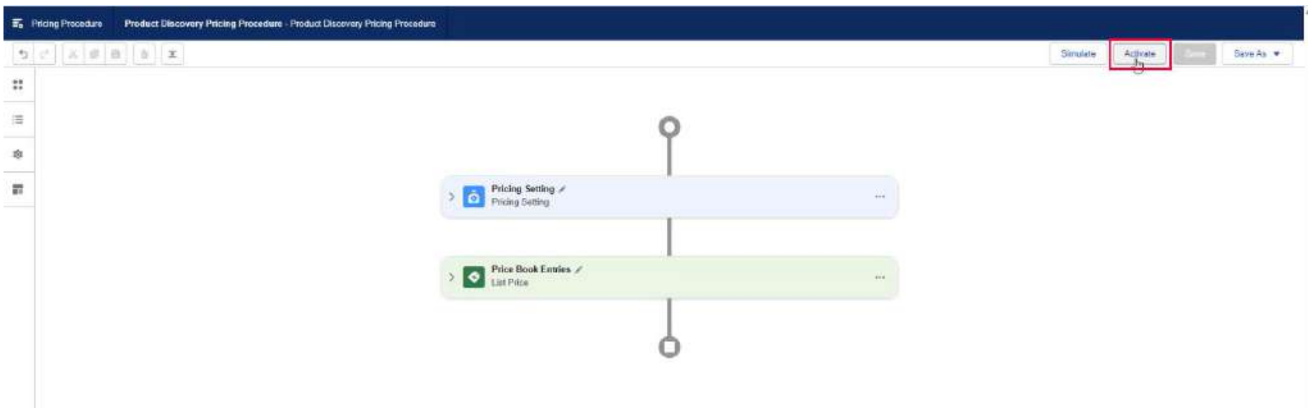
8. In the **Edit Pricing Procedure** dialog box, from the **Context Definition** list, select **RLM_ProductDiscoveryContext**. Click **Save**.



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



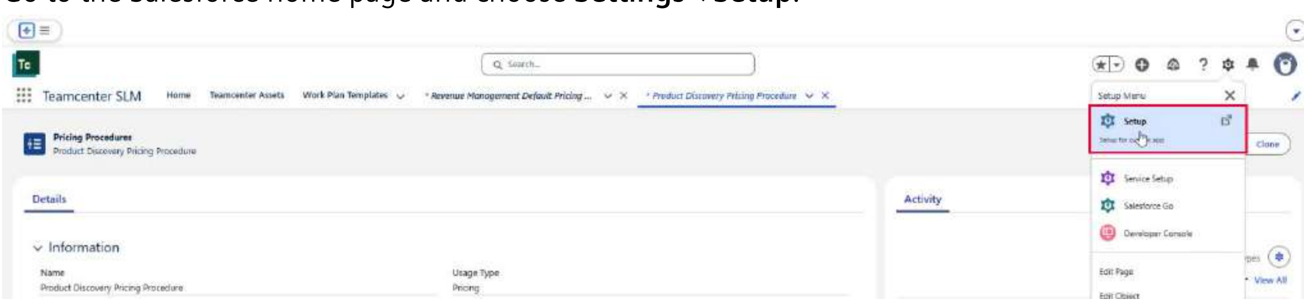
10. Click **Activate**.



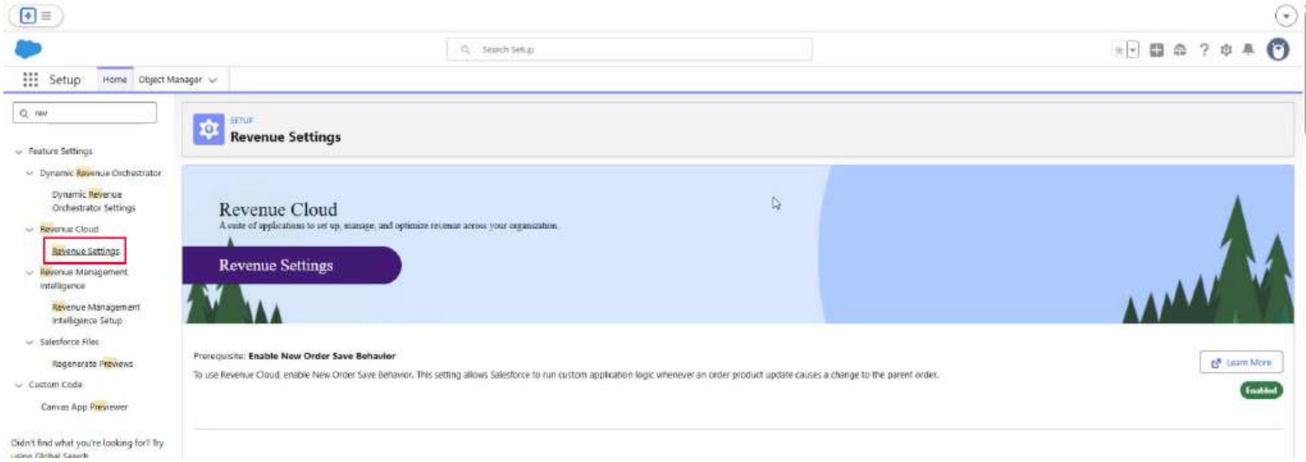
Finalize Salesforce pricing and product discovery settings

Procedure

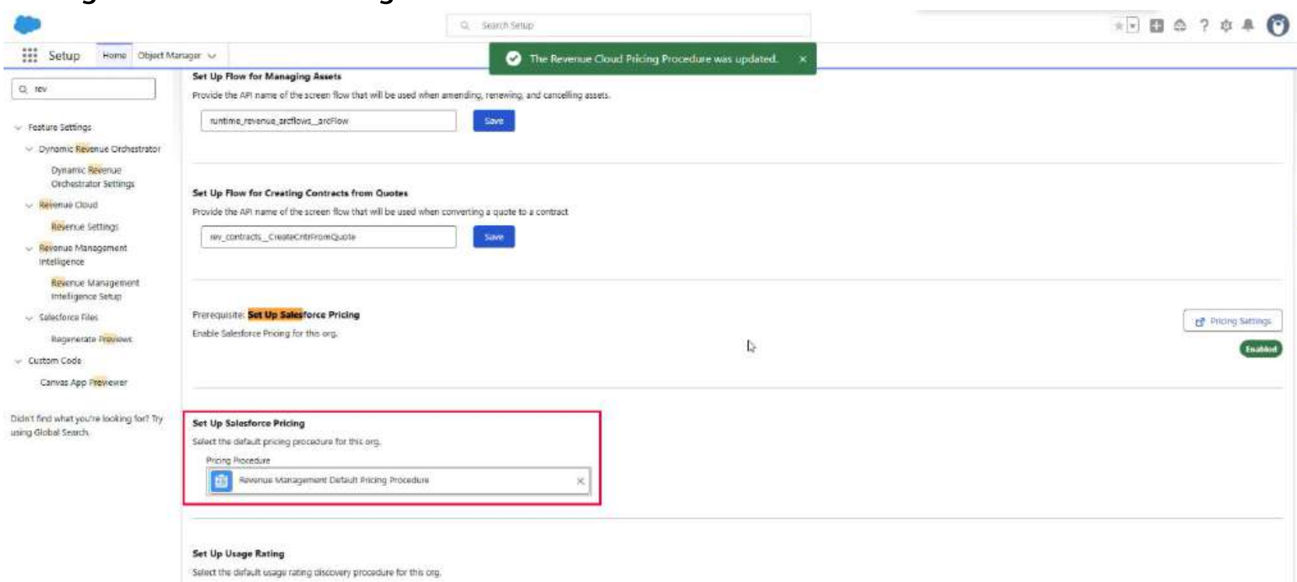
1. Go to the Salesforce home page and choose **Settings→Setup**.



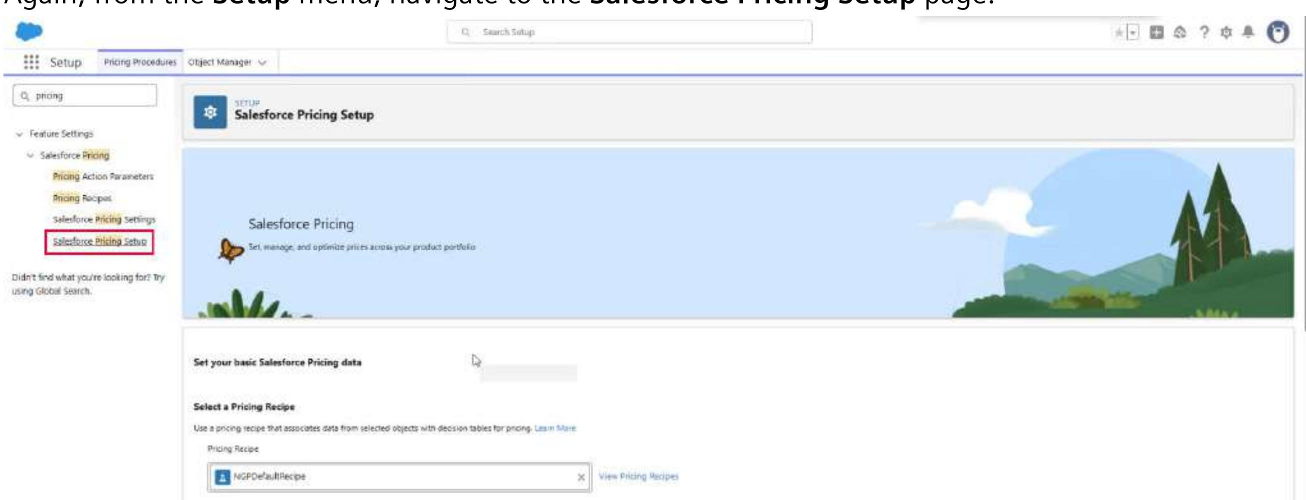
2. From the **Setup** menu, navigate to the **Revenue Settings** page.



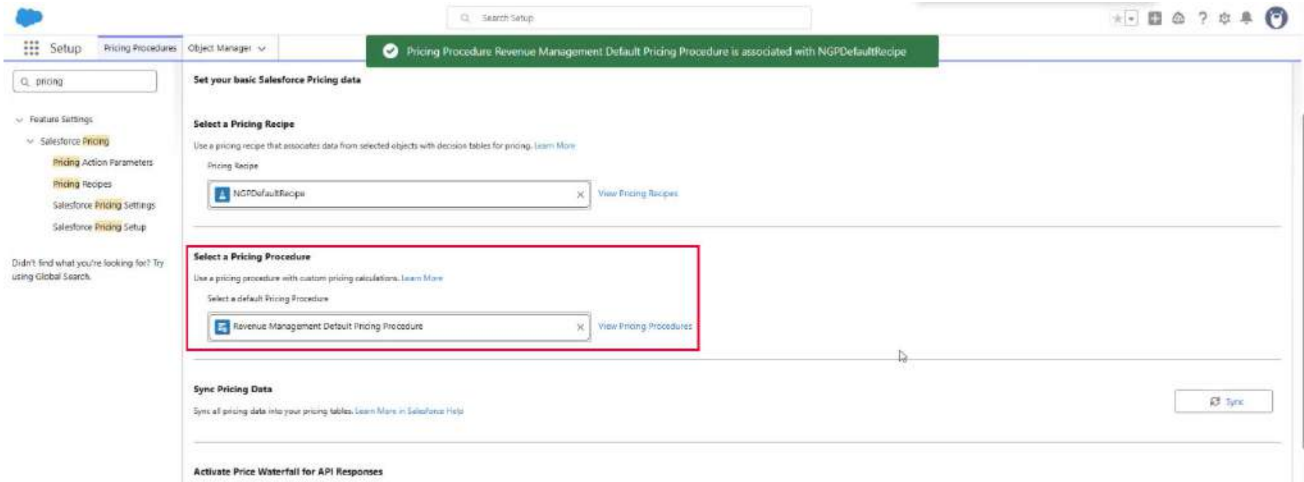
3. On the **Revenue Settings** page, under the **Set Up Salesforce Pricing** section, select **Revenue Management Default Pricing Procedure** from the list.



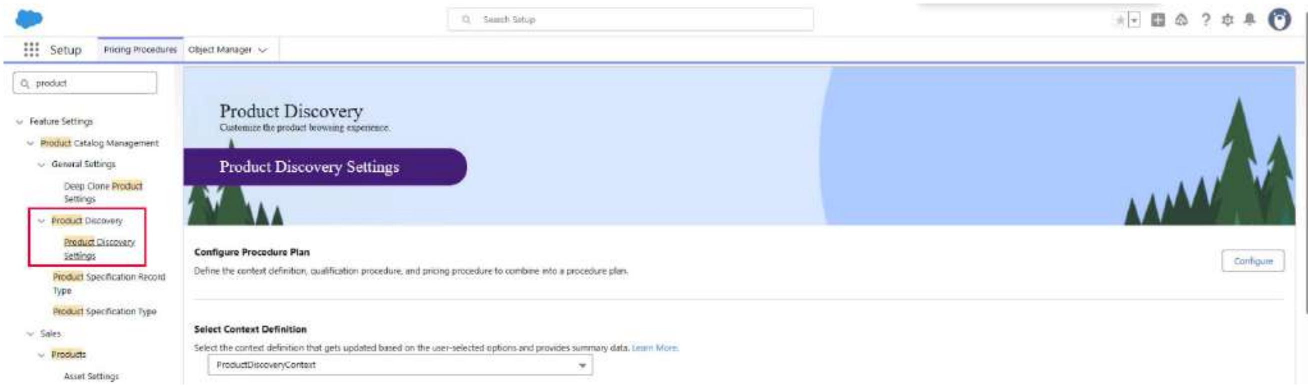
4. Again, from the **Setup** menu, navigate to the **Salesforce Pricing Setup** page.



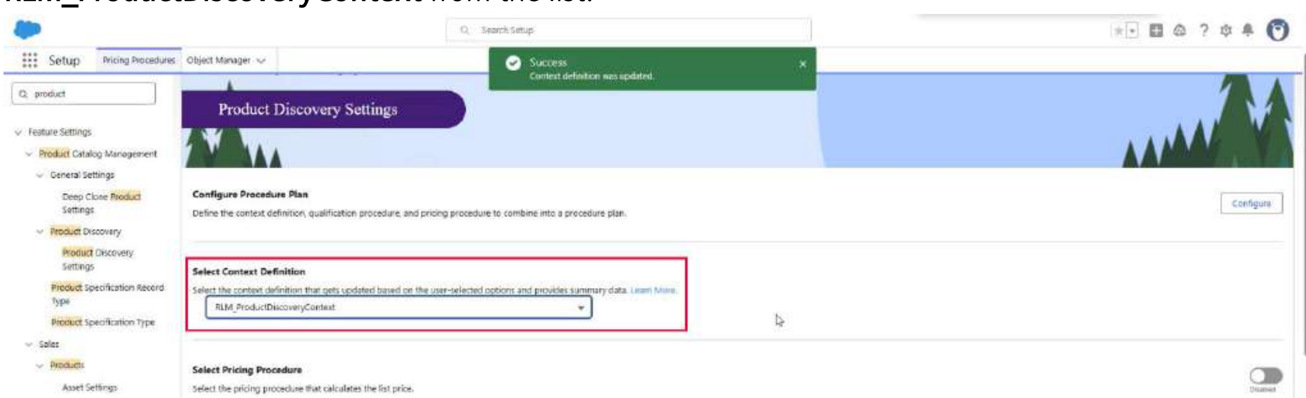
5. On the **Salesforce Pricing Setup** page, under the **Select a Pricing Procedure** section, select **Revenue Management Default Pricing Procedure** from the list.



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

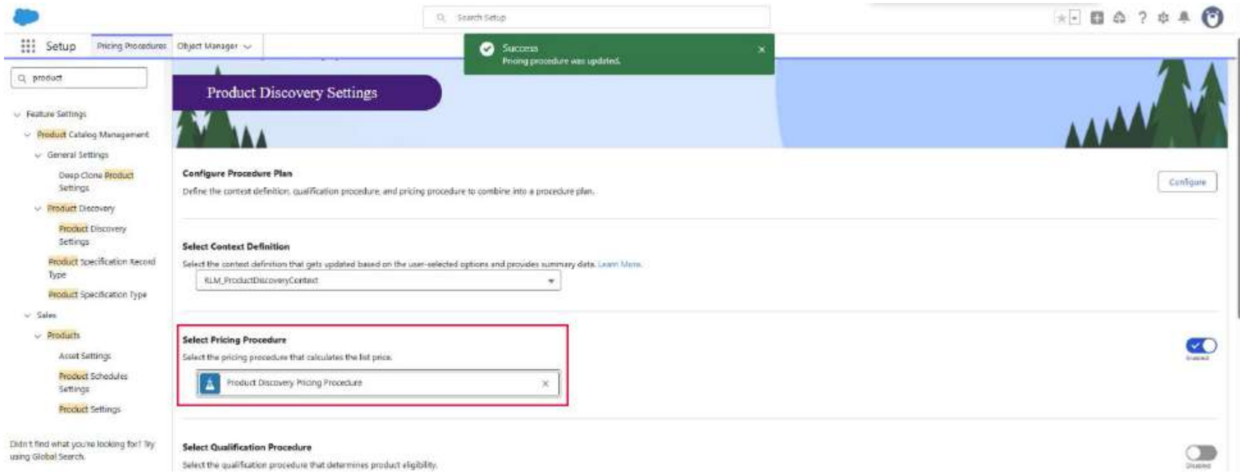


7. On the **Product Discovery Settings** page, under the **Select Context Definition** section, select **RLM_ProductDiscoveryContext** from the list.



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>`.

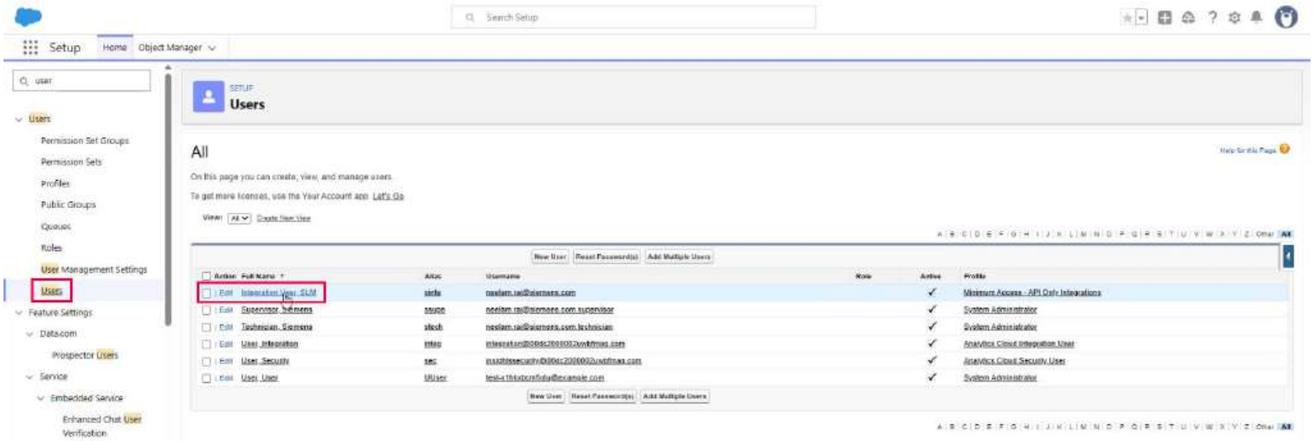
      Example

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

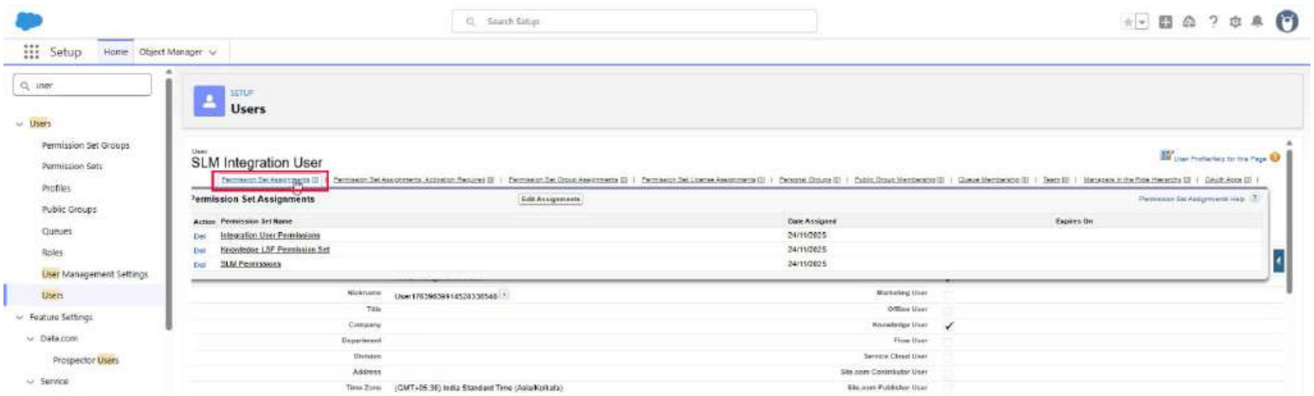
Assign permission set for integration user

Procedure

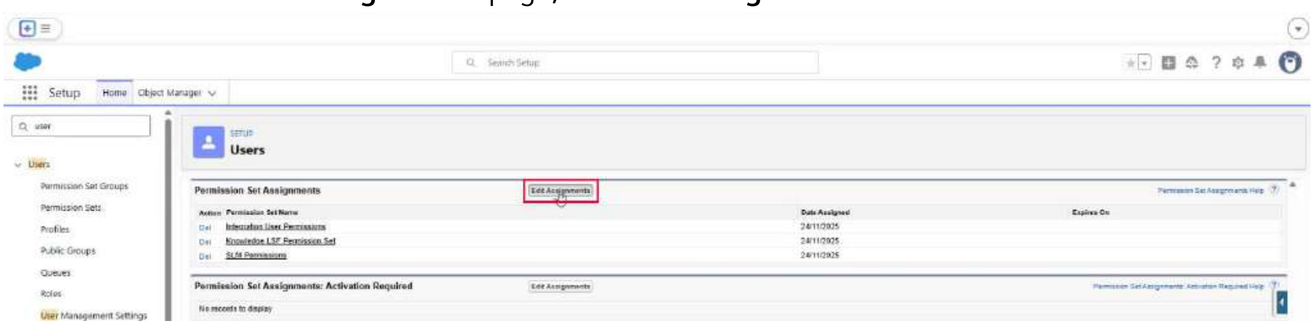
1. From the **Setup** menu, navigate to the **Users** page and select **Integration User**.



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

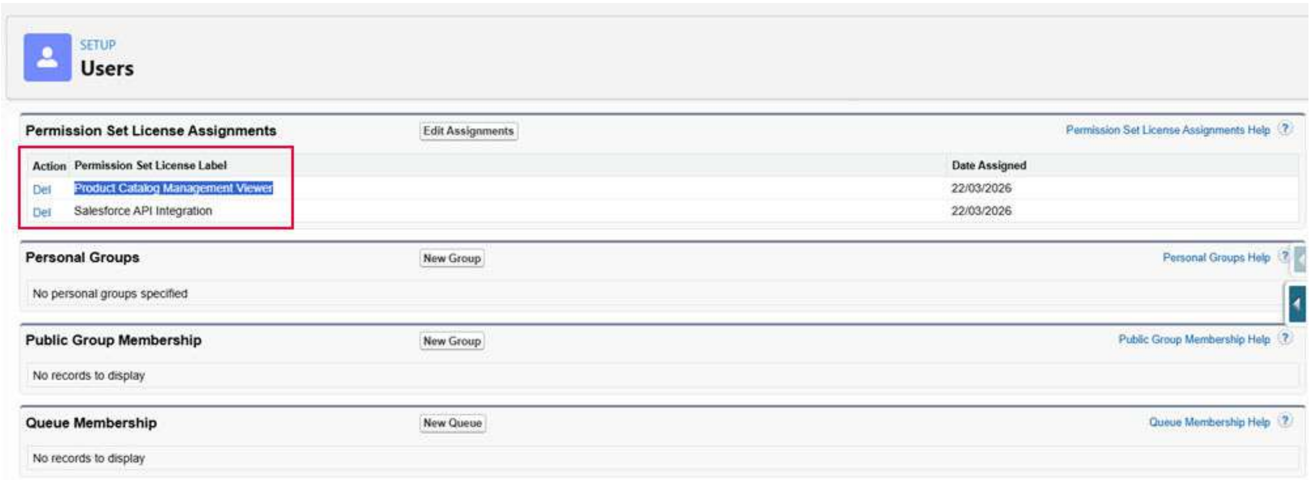


3. On the **Permission Set Assignments** page, click **Edit Assignments**.

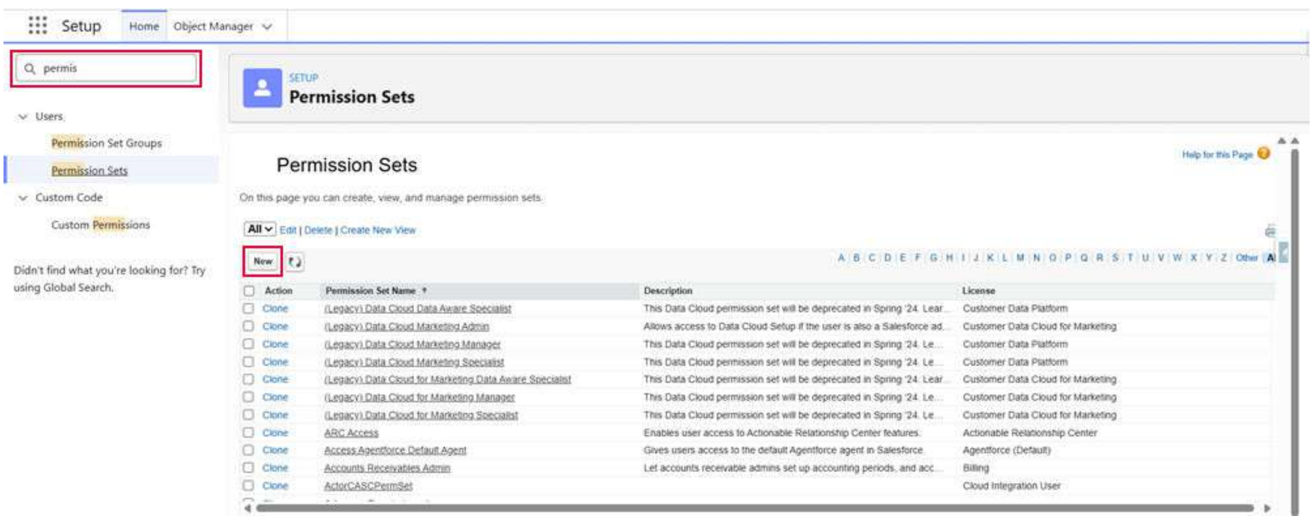


4. Select the following permission set licenses:

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

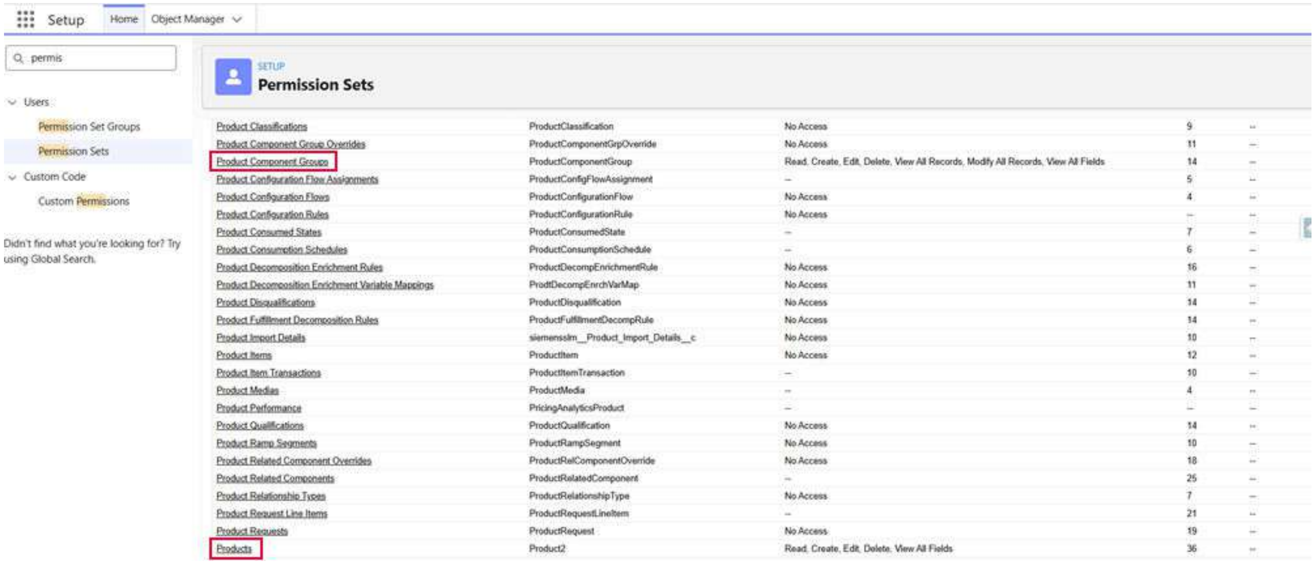


5. Add **SLM RLM Integration User** and **Product Catalog Management Viewer** from the **Available Permission Sets** column to the **Enabled Permission Sets** column and click **Save**.
6. In the **Quick Find** box, search for **Permission Sets** and click **New** from the **Permission Sets** page.



The **Create** page opens.

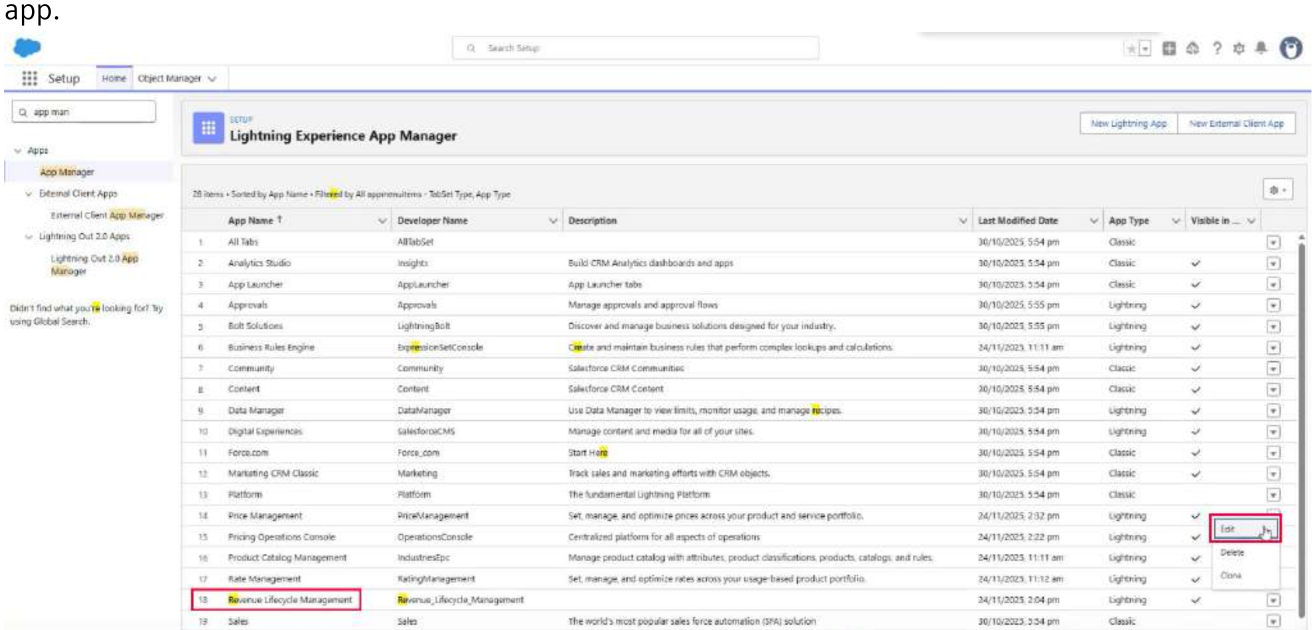
7. On the **Create** page, enter **RLM Additional Permission** as the permission set name and click **Save**.
8. From the **Permission Sets** page, click **Object Settings** and search for the **Product** and **Product Component Group** objects.
9. Grant access to both objects and click **Save**.
10.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



Configure Revenue Lifecycle Management App in App Manager

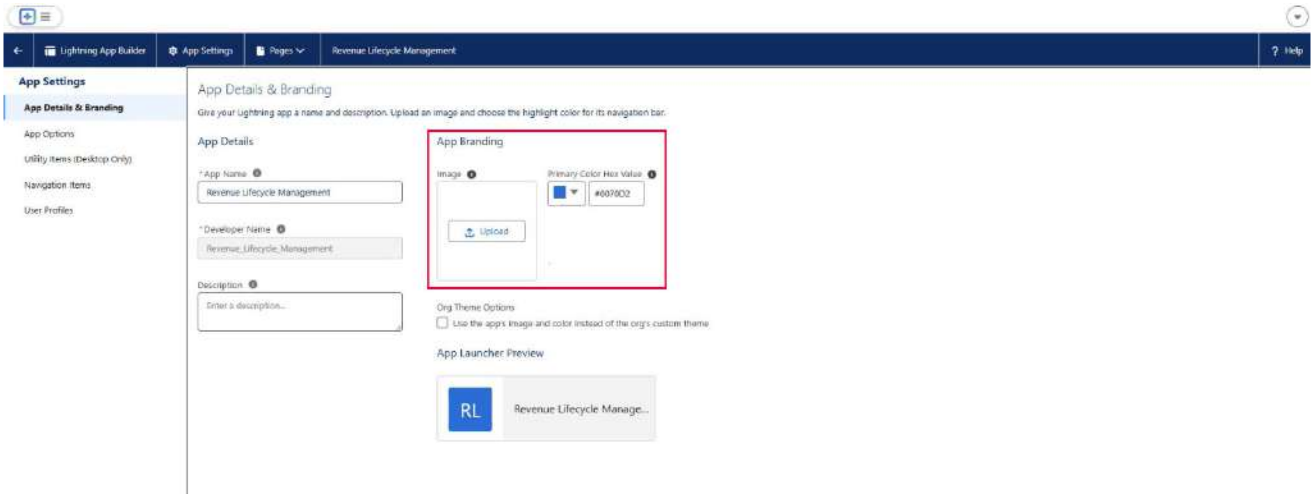
Procedure

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.

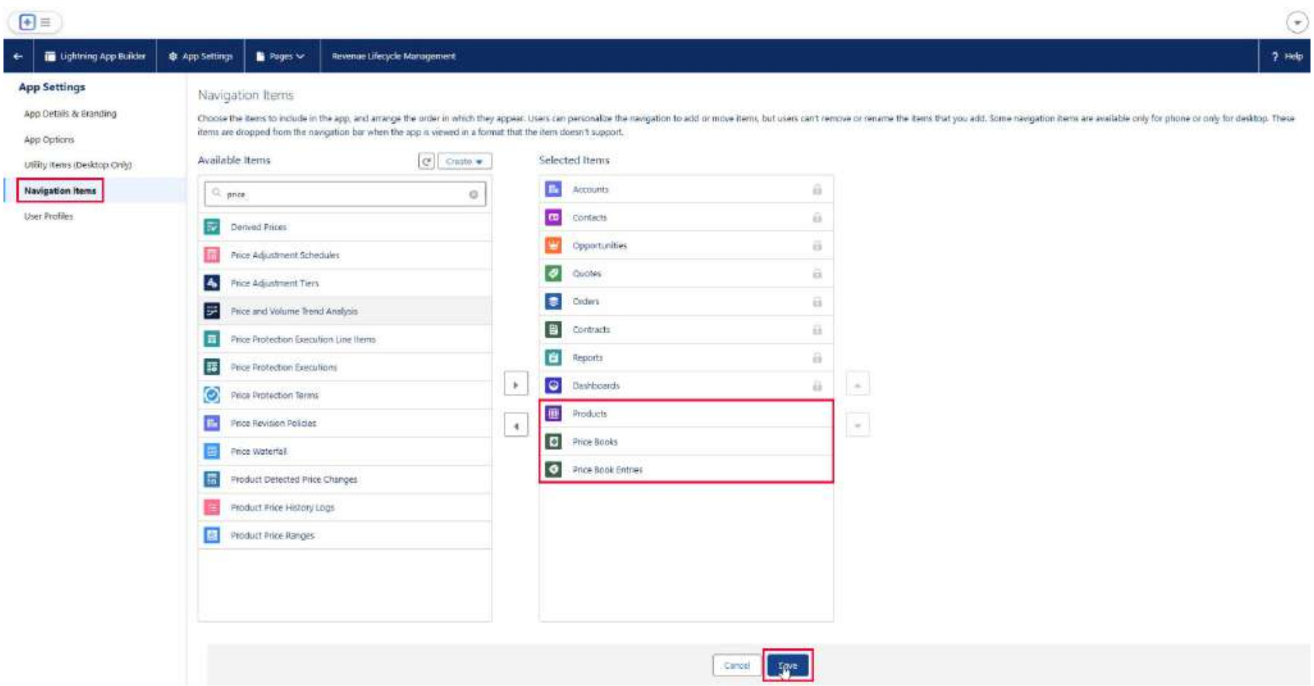


The **App Settings** page opens.

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



4. 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**.



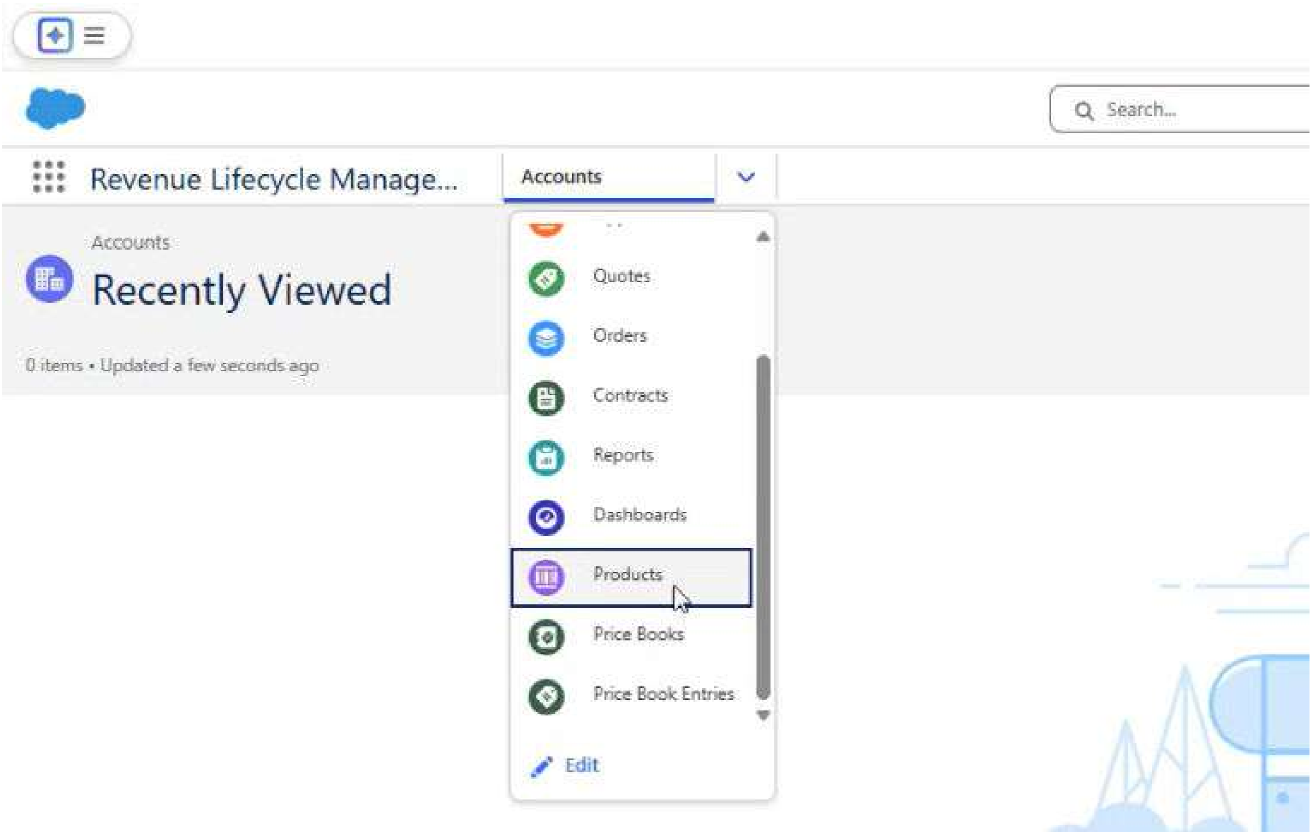
You are now ready to use the **Revenue Lifecycle Management** app from the **Salesforce App Launcher**.

Add structure tab for product (optional)

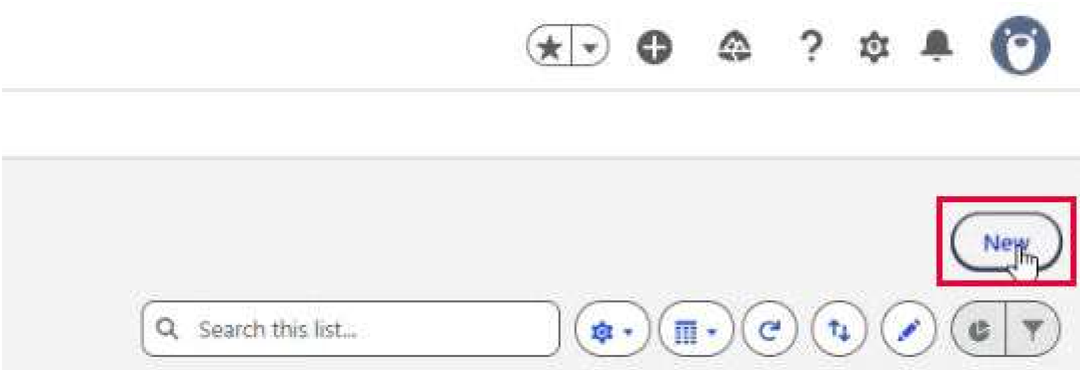
This step is optional and allows you to view the structure for a given product catalog.

Procedure

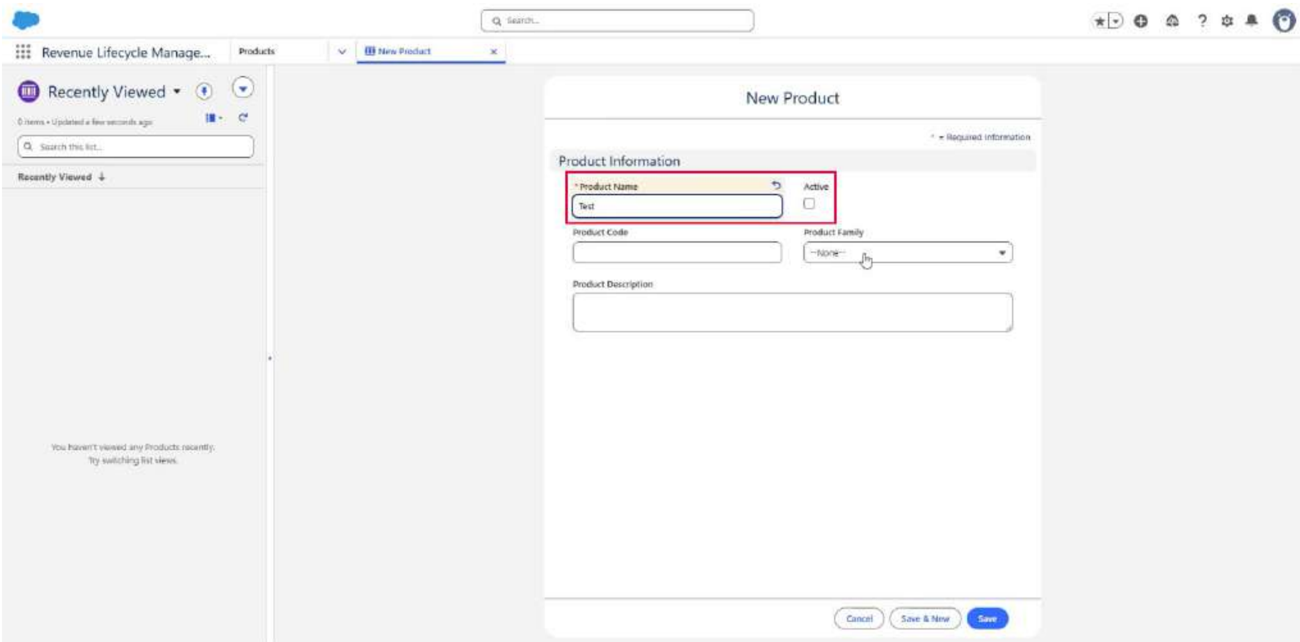
1. Open the **Revenue Lifecycle Management** app and select **Products** from the drop-down list.



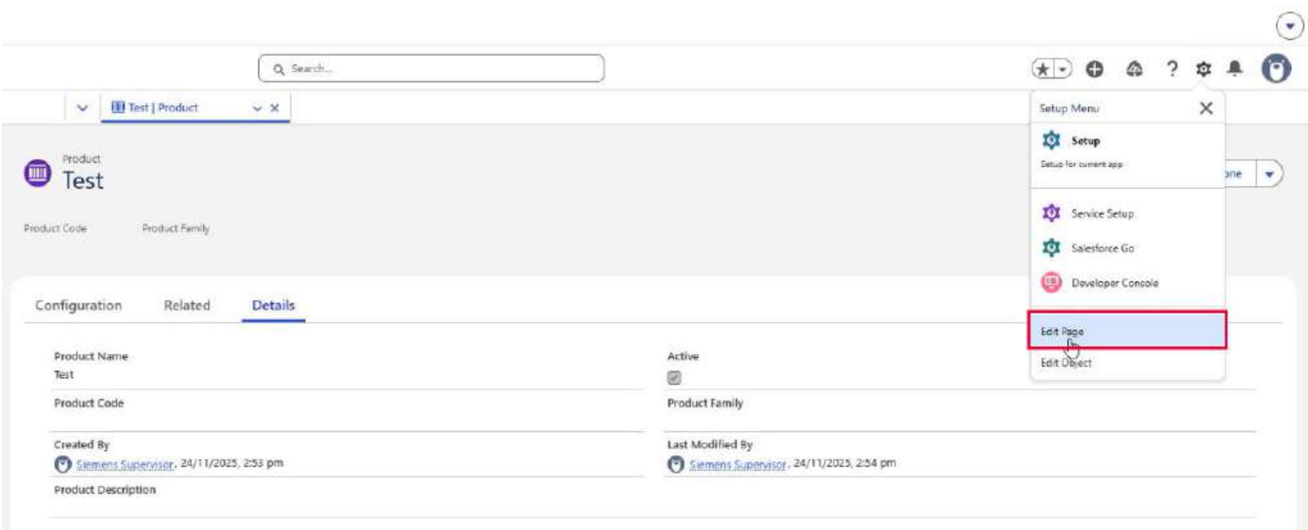
2. On the **Products** page, click **New**.



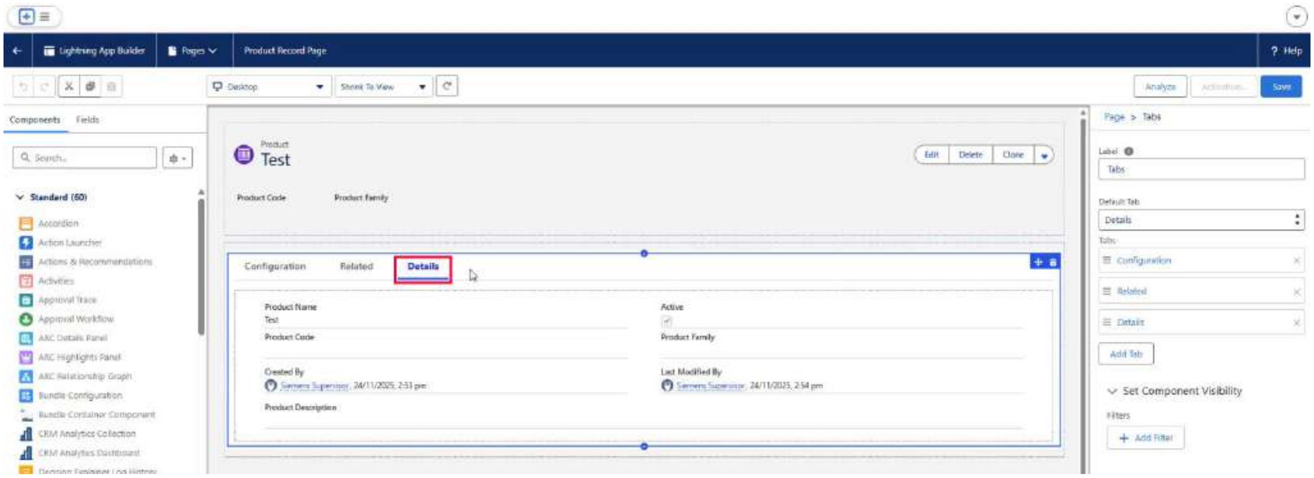
3. In the **New Product** dialog box, enter the **Product Name**, select the **Active** checkbox, and then click **Save**.



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



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



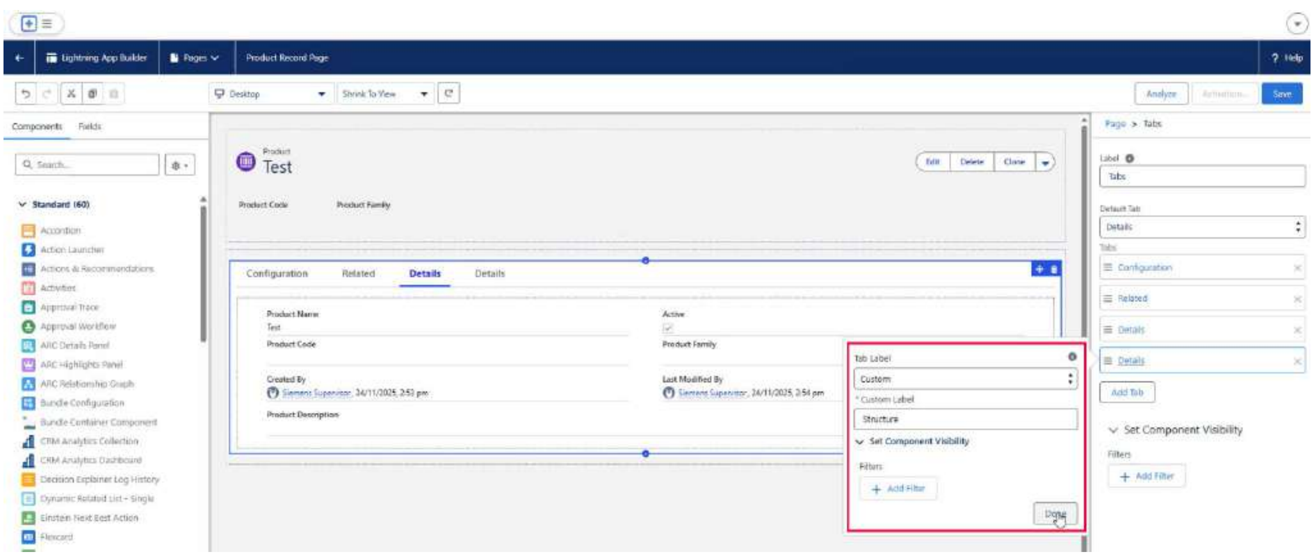
6. In the **Tabs** panel, click **Add Tab**.

   a. Click the newly created tab in the list.
   The dialog box for the newly created tab opens.

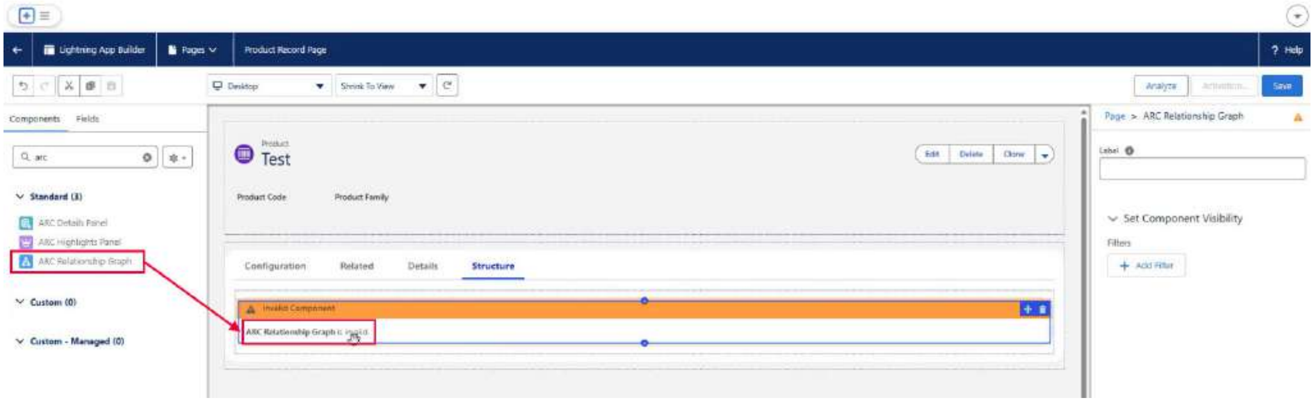
   b. In the dialog box, for **Tab Label**, select **Custom** from the list.

   c. For **Custom Label**, enter the value as **Structure**.

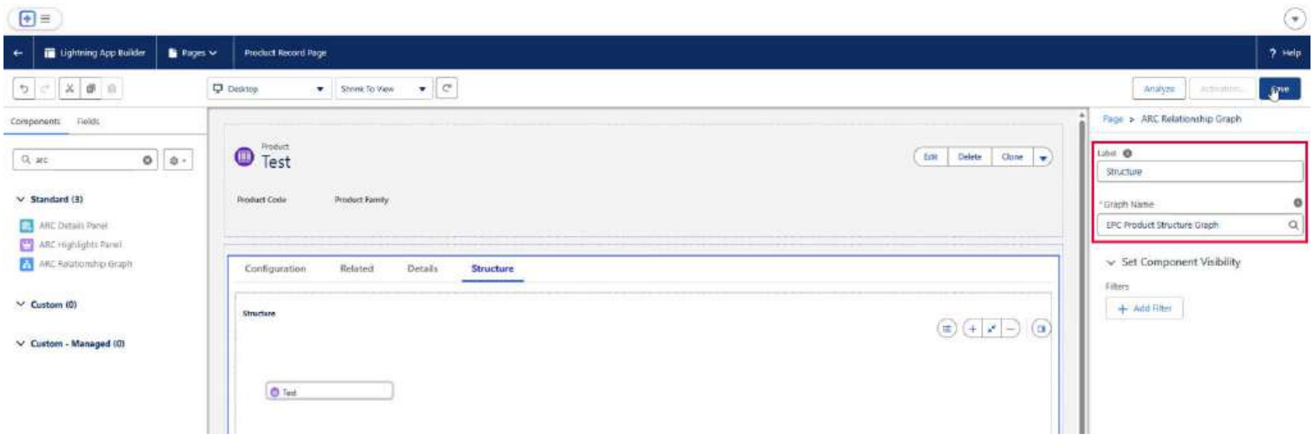
   d. Click **Done**.



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.

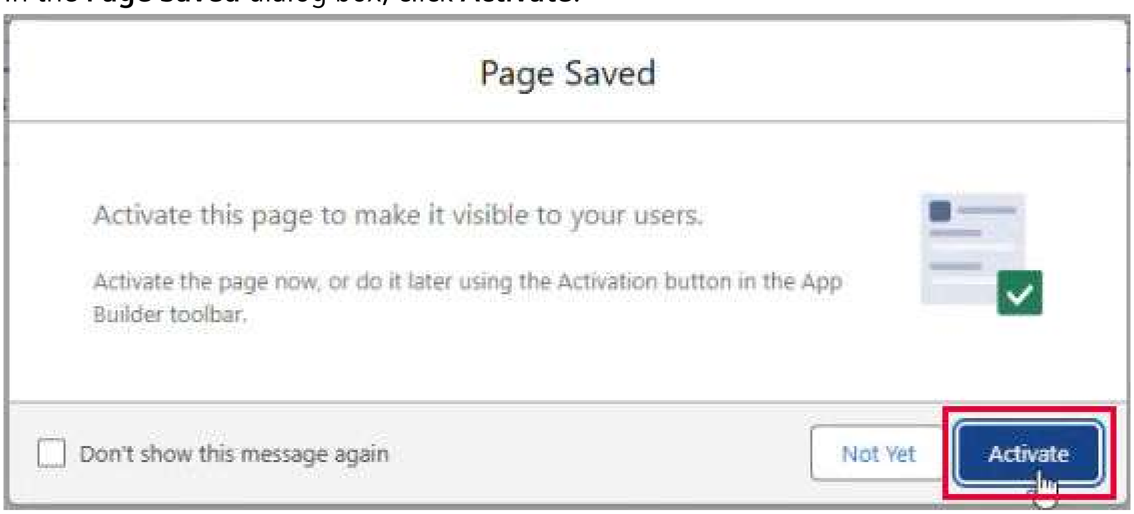


8. Go to the **ARC Relationship Graph** panel, add **Label** as **Structure** and **Group Name** as **EPC Product Structure Graph**.

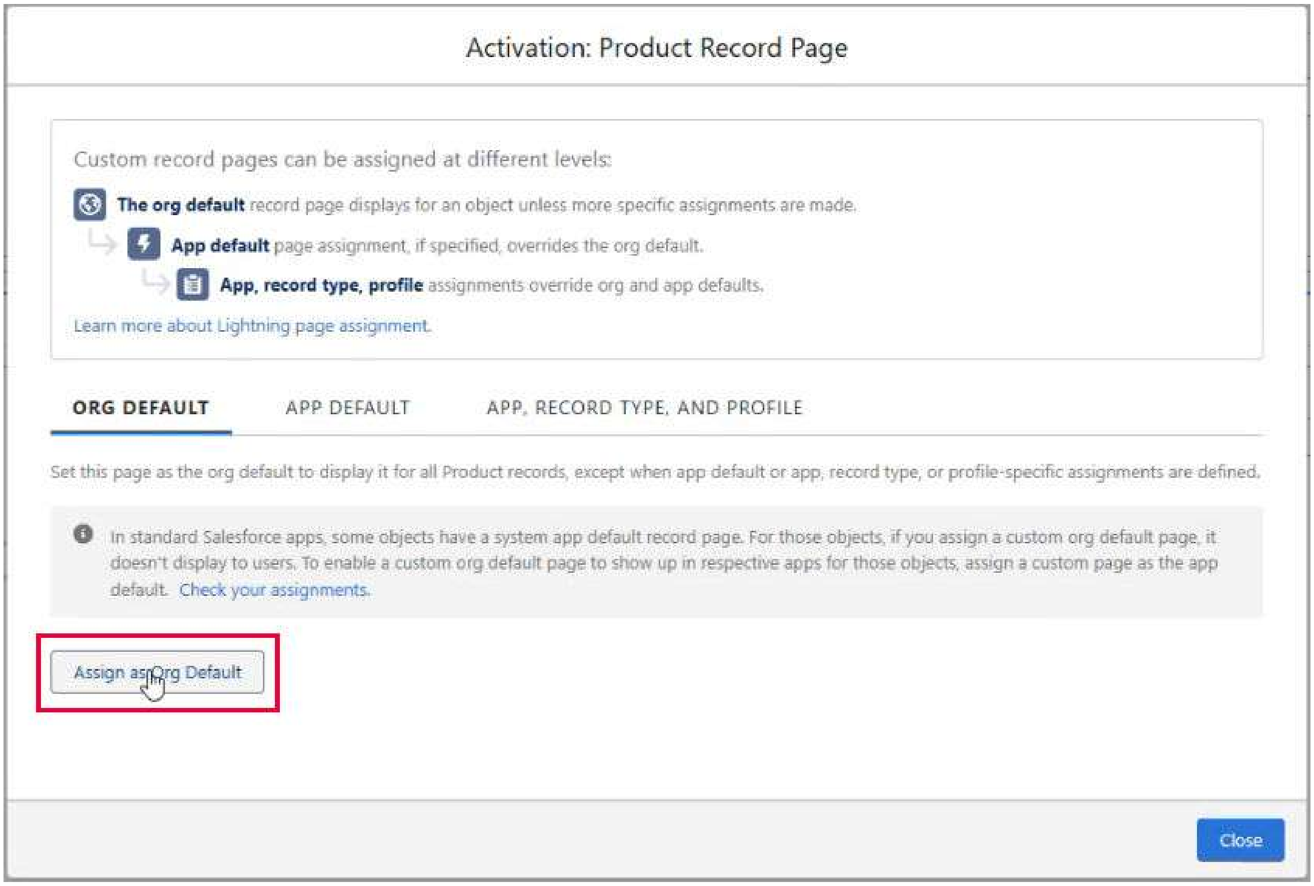


9. Click **Save**.

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

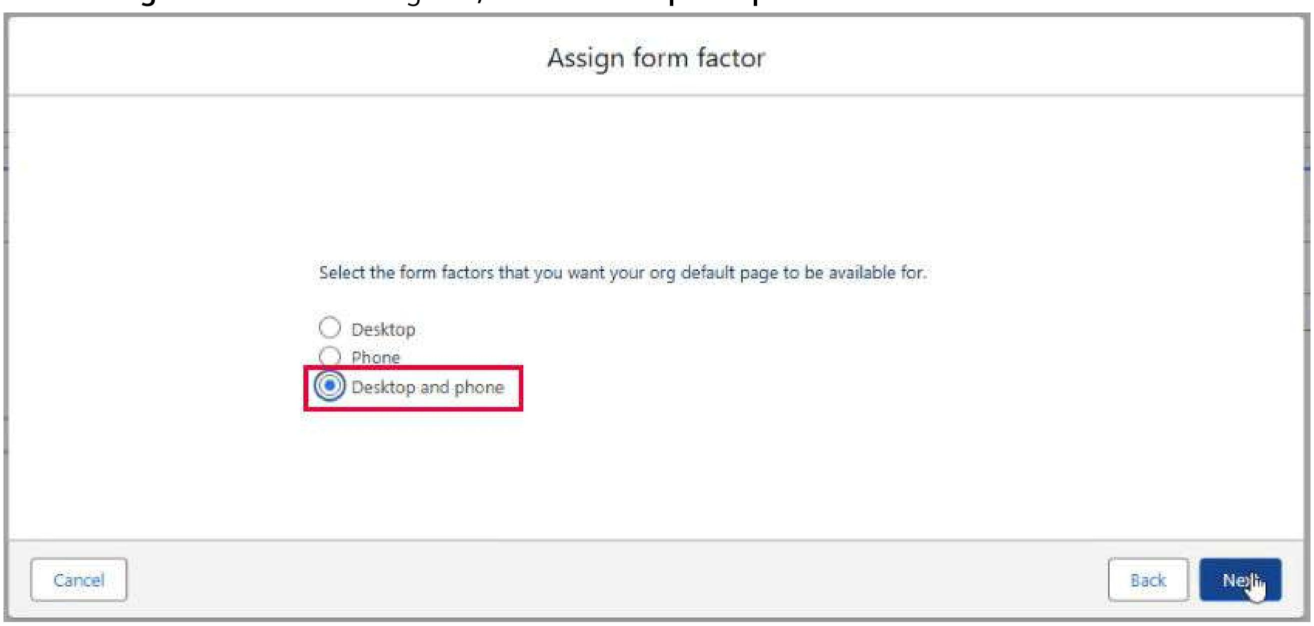


11. In the **Activation: Product Record Page** dialog box, click **Assign as Org Default**.



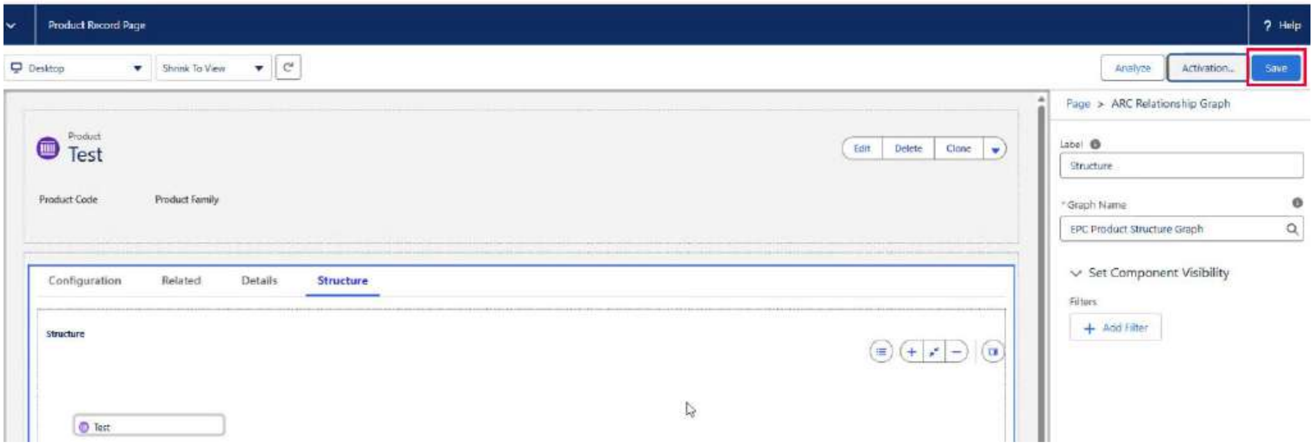
The **Assign form factor** dialog box opens.

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**.

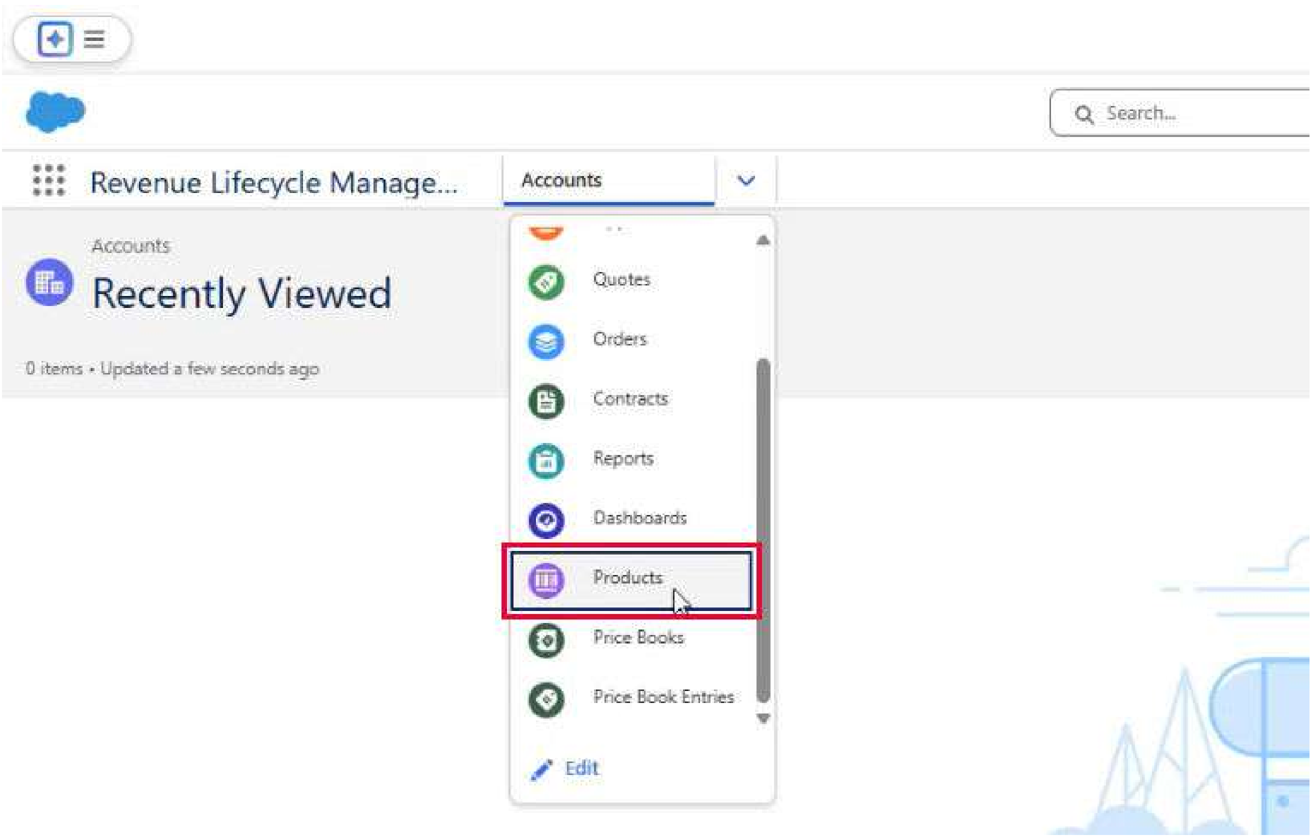


Add UID and price book entry for product

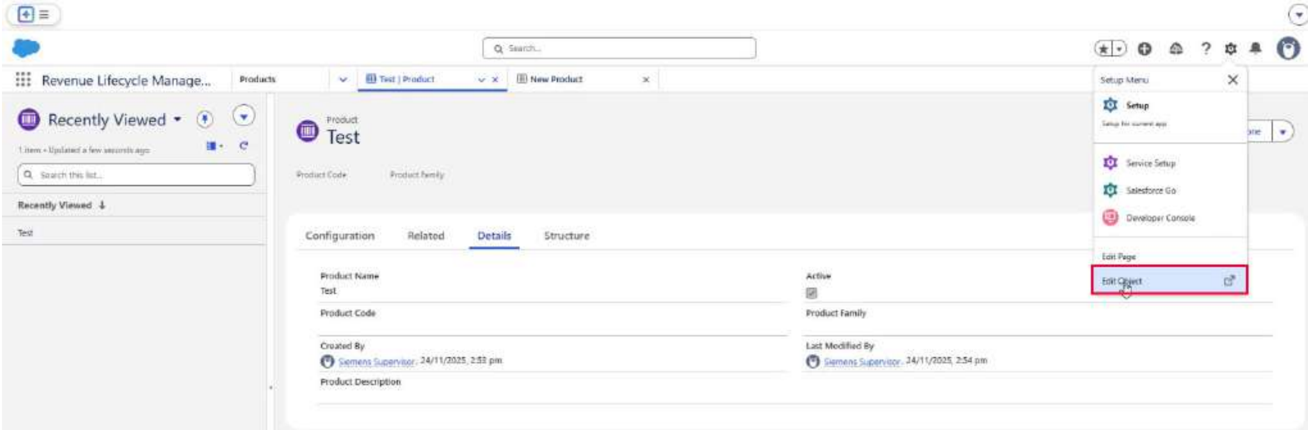
With these steps, you can ensure that the UID and Price Book Entry fields are properly configured and visible.

Procedure

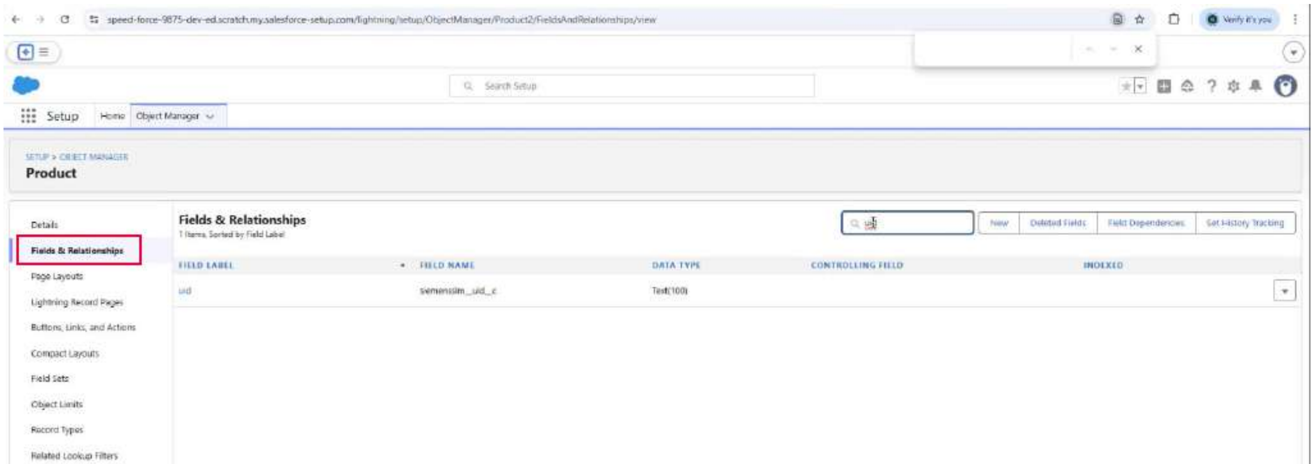
1. Open the **Revenue Lifecycle Management** app and select **Products** from the drop-down list.



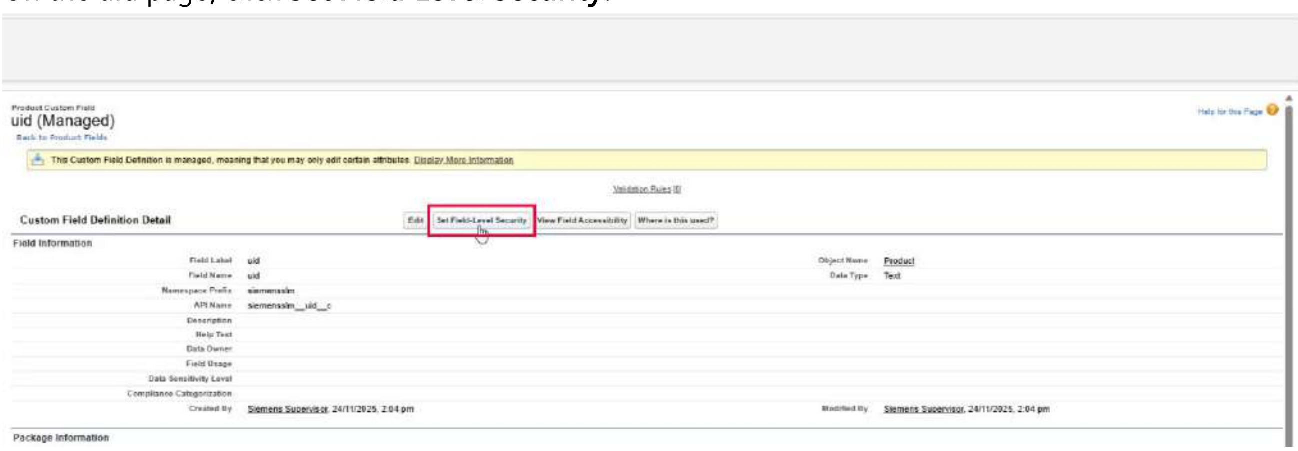
2. On the **Products** page, open the required product and choose **Setup→Edit Object**.



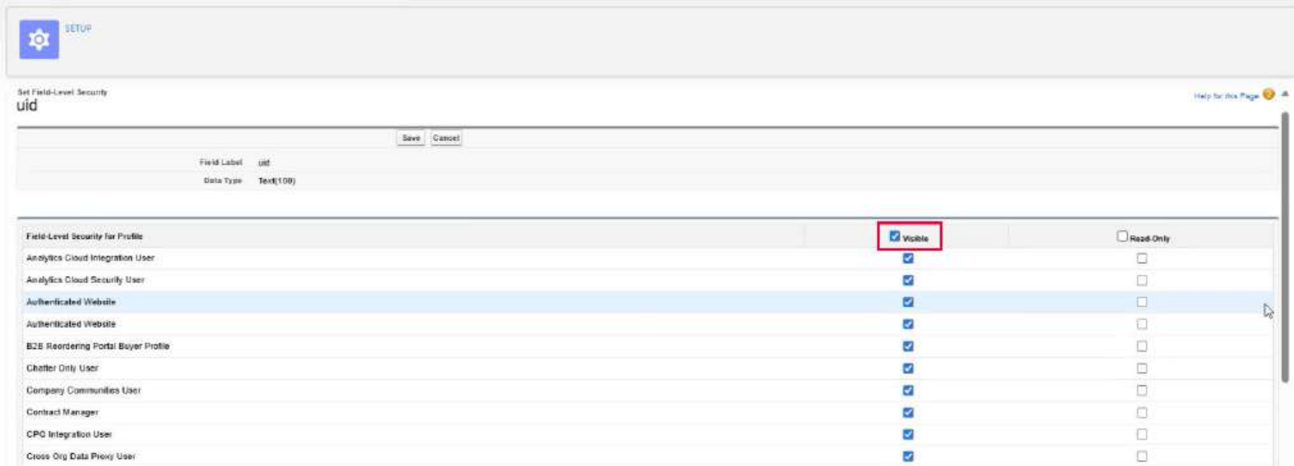
3. On the **Object Manager** page, navigate to the **Fields and Relationships** tab on the left-side panel, and search for **uid** using the **Search** bar.



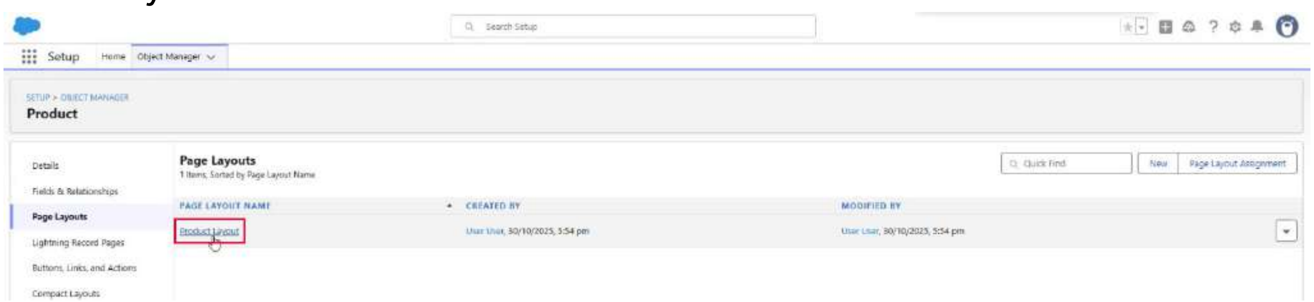
4. On the uid page, click **Set Field-Level Security**.



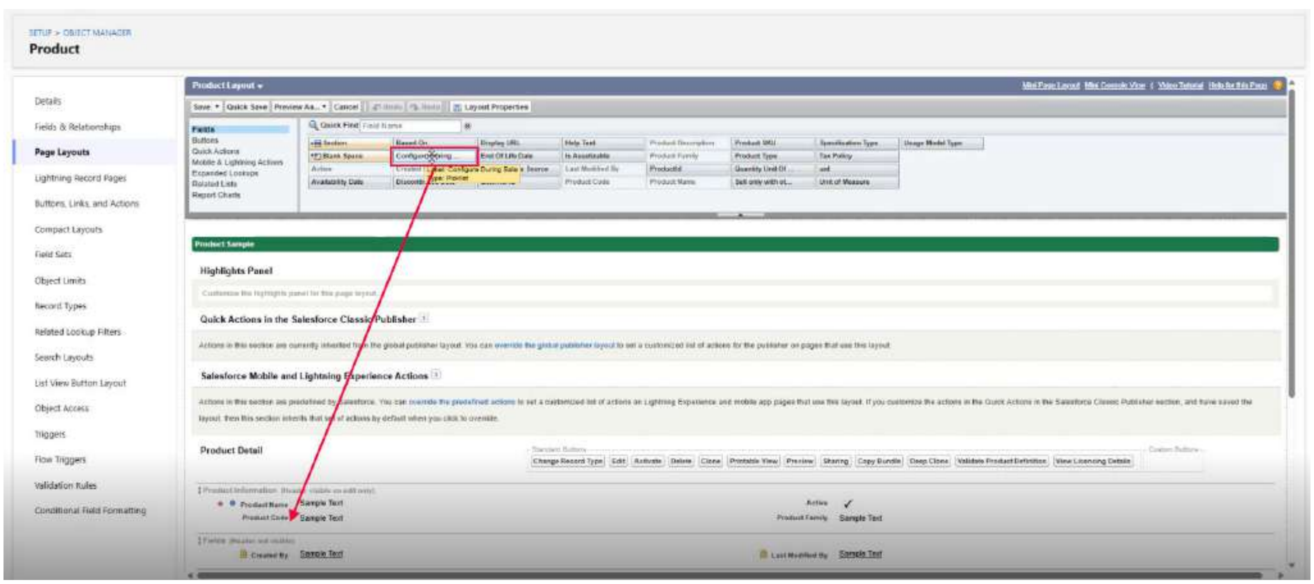
5. On the **Set Field-Level Security** page, select the **Visible** checkbox on the table header and click **Save**.



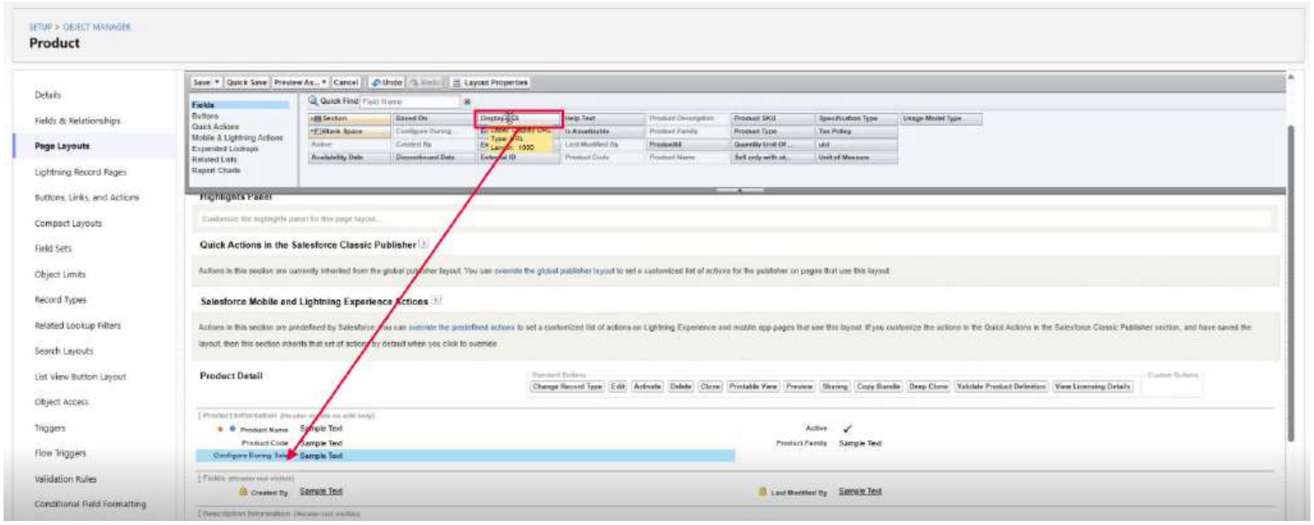
6. On the **Object Manager** page, navigate to the **Page Layouts** tab on the left-side panel, and click **Product Layout**.



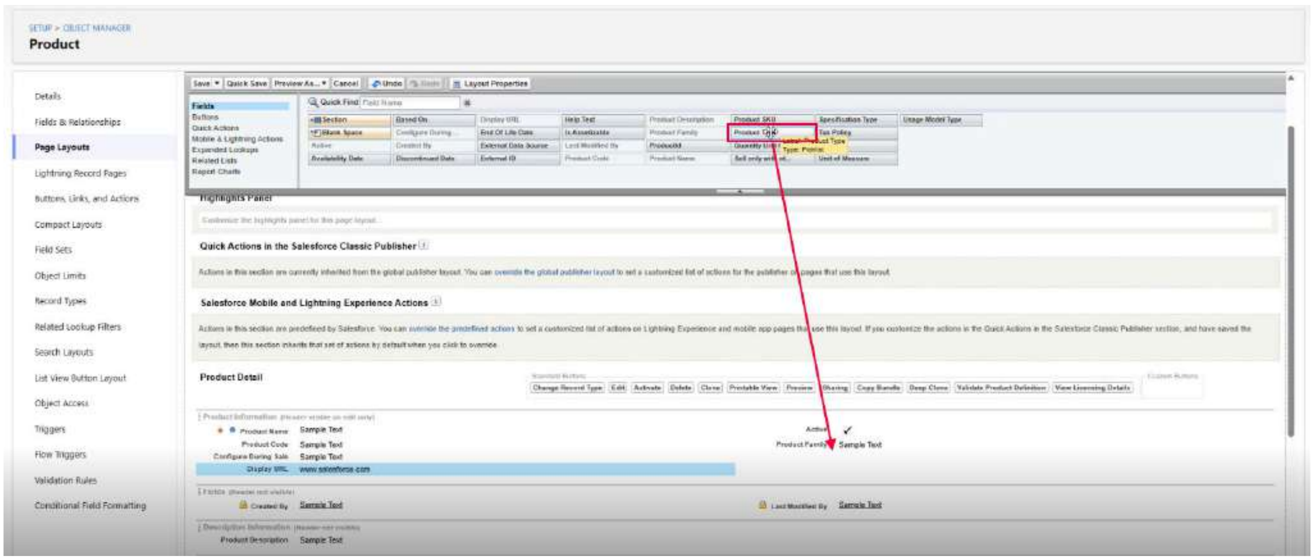
7. On the **Product Layout** page, select and drag the **Configure During Sale** field to below the **Product Code** field.



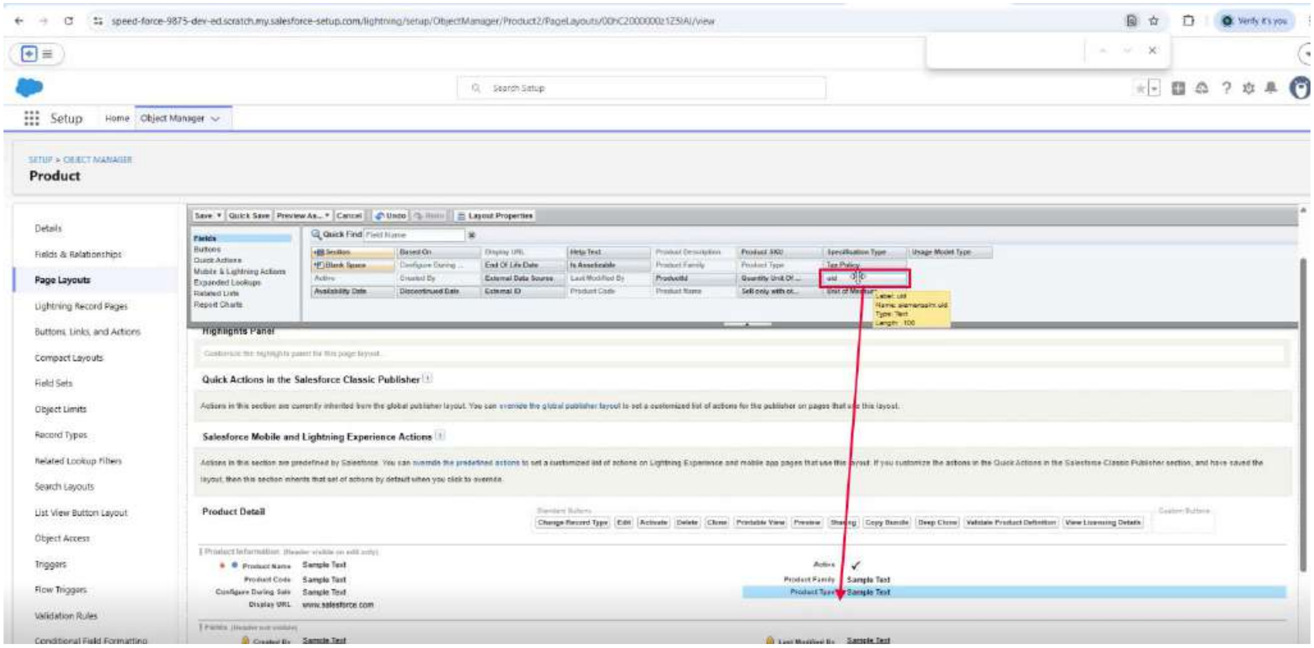
8. Similarly, select and drag the **Display URL** field to below the **Configure During Sale** field.



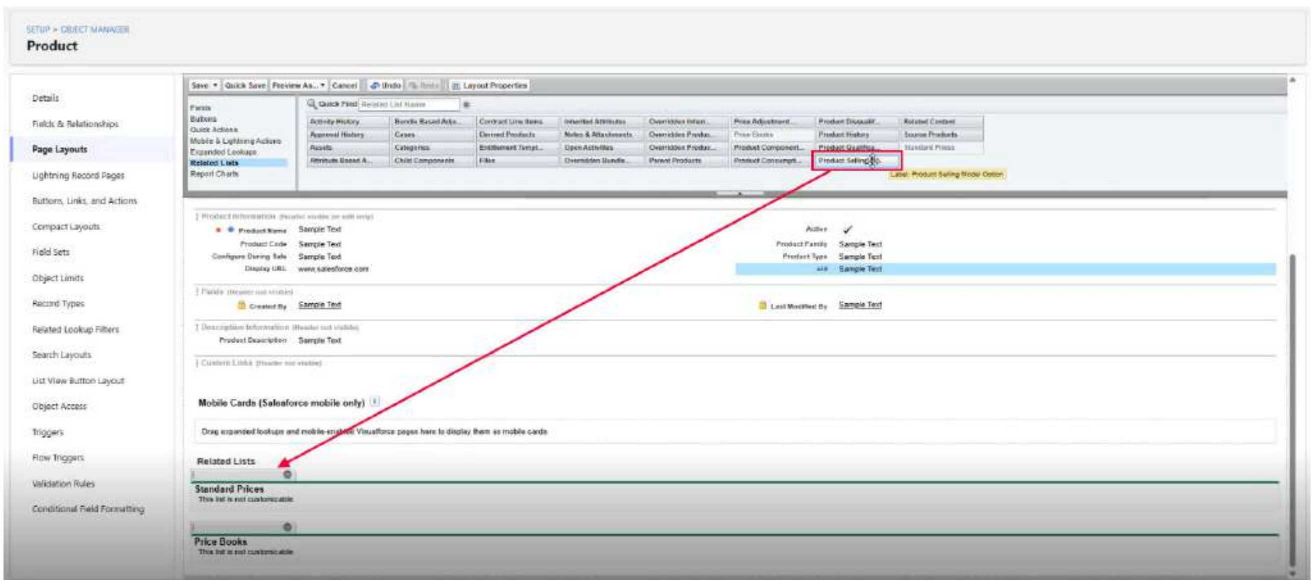
9. Now, select and drag the **Product Type** field to below the **Product Family** field.



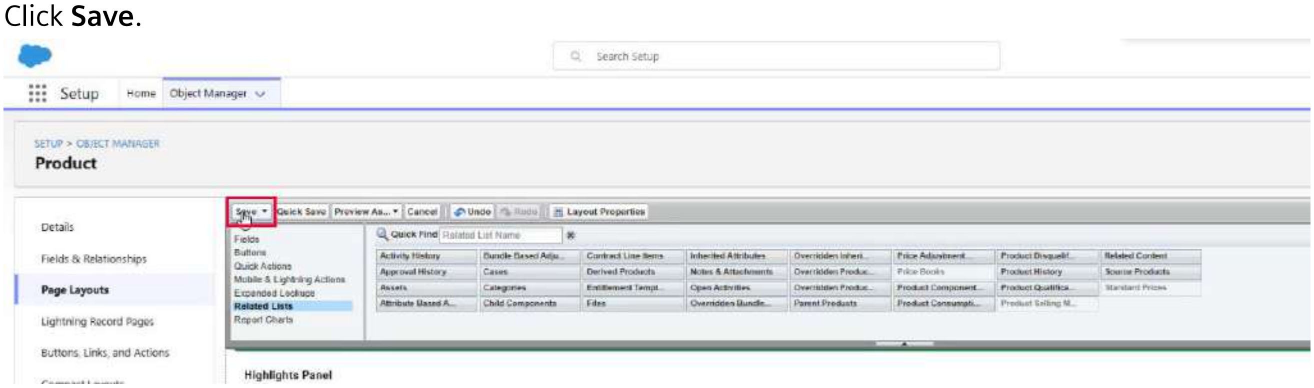
10. Select and drag the **uid** field to below the **Product Type** field.



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.

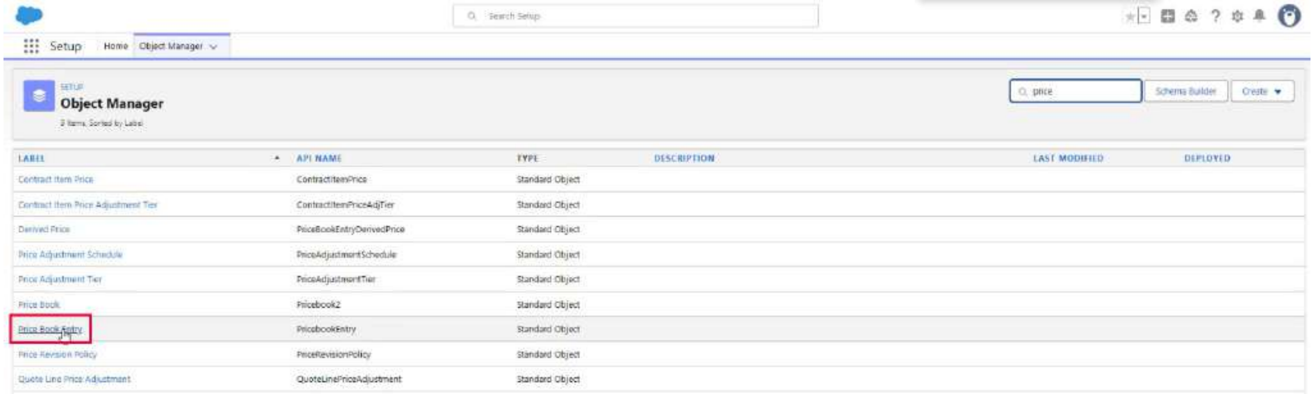


12. Click **Save**.

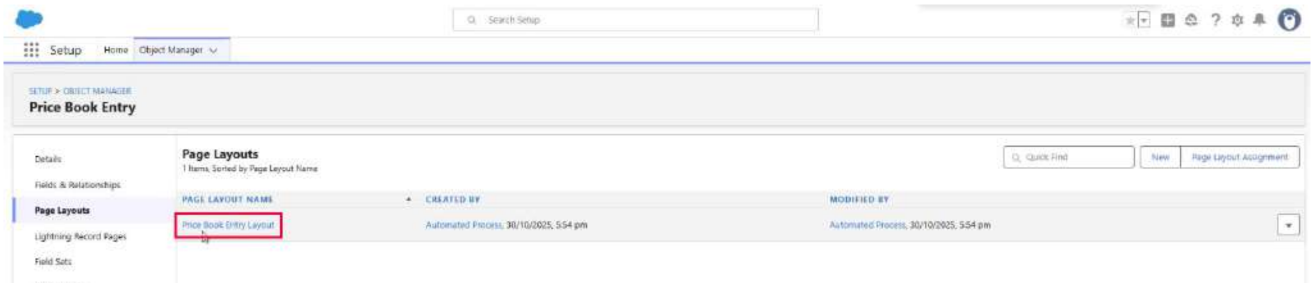


13. In the **Overwrite Users' Related List Customizations?** dialog box, click **Yes**.

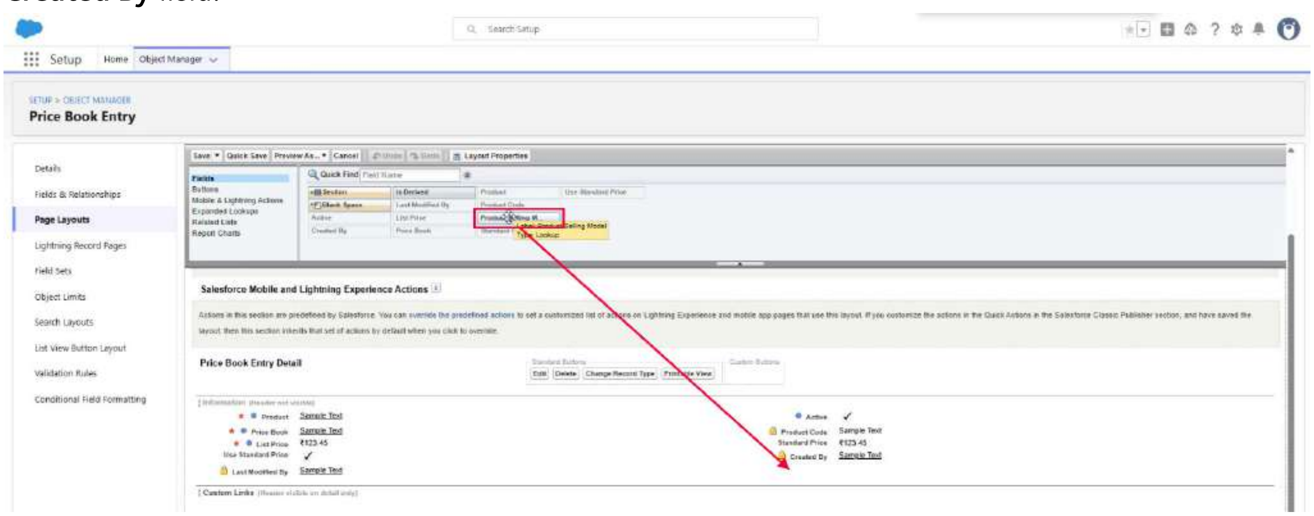
14. Navigate to the **Object Manager** page and search for **price book entry** using the **Search** box.



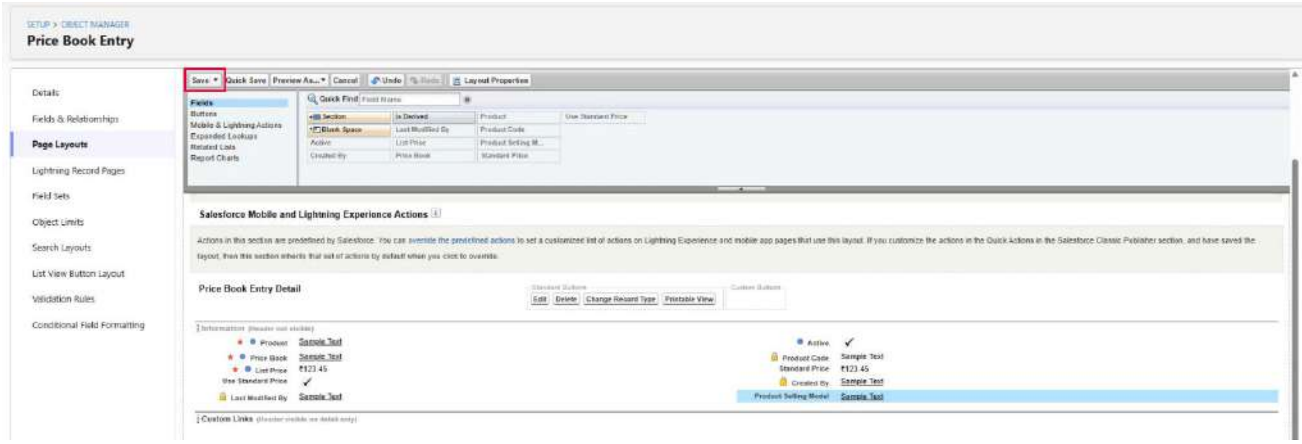
15. On the **Price Book Entry** page, navigate to the **Page Layouts** tab on the left-side panel, and click **Price Book Entry Layout**.



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**.



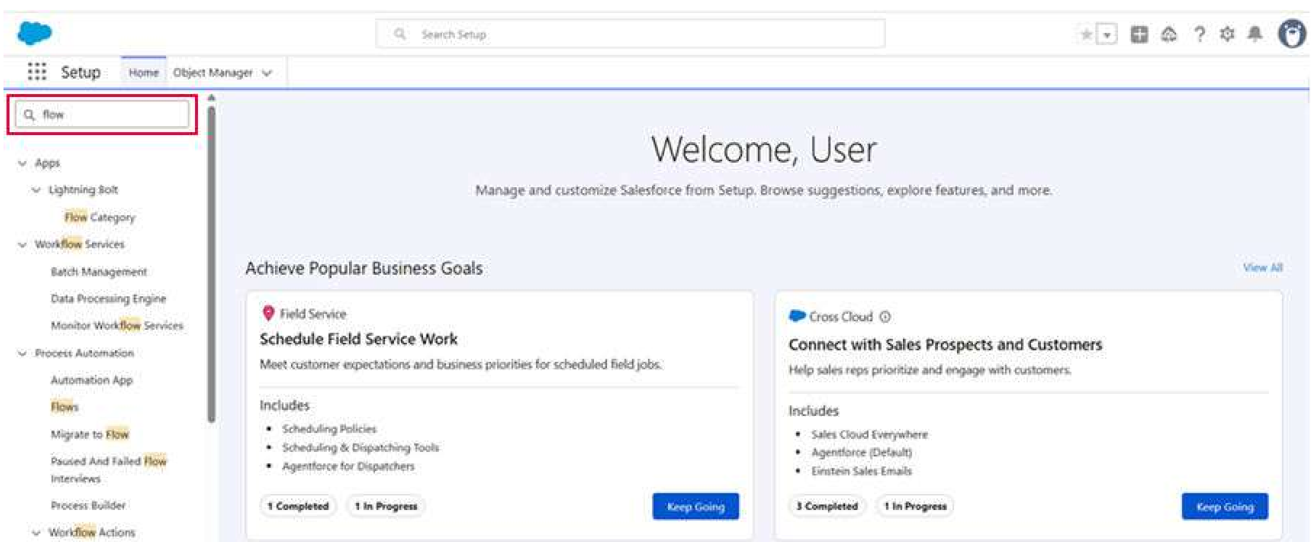
> **Note**
>
> Ensure that you have added the required Product Selling Models, Product Catalogs, Price Books, and defined the necessary Product Configurator Flow.

Set up custom configurator

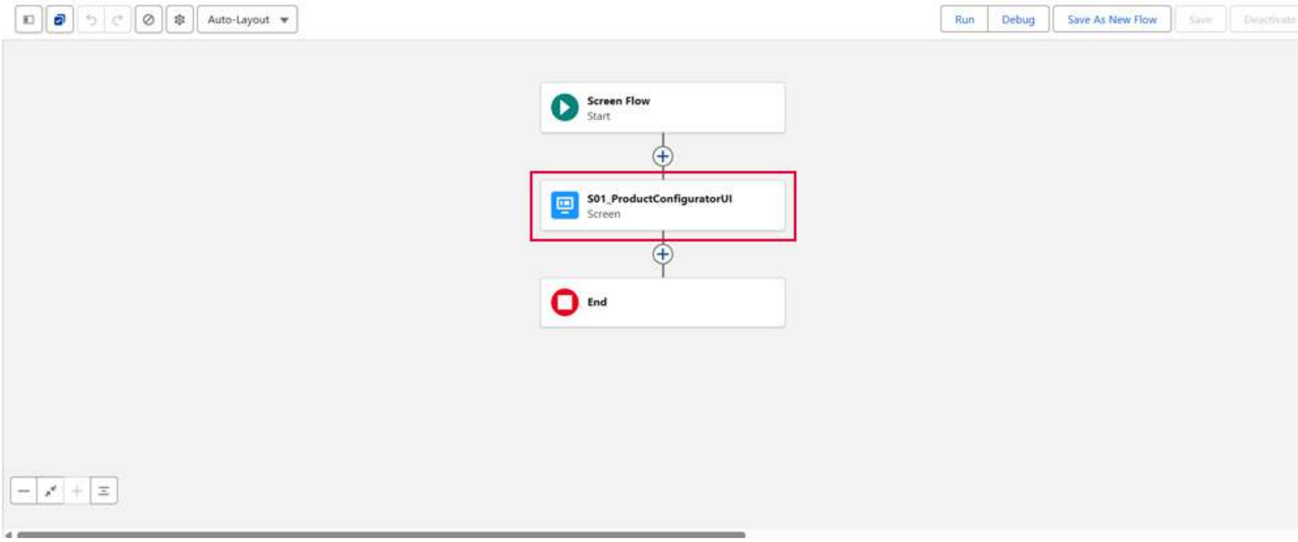
Set up a custom screen flow for the RLM configurator to enable product-specific configuration in Salesforce.

Procedure

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

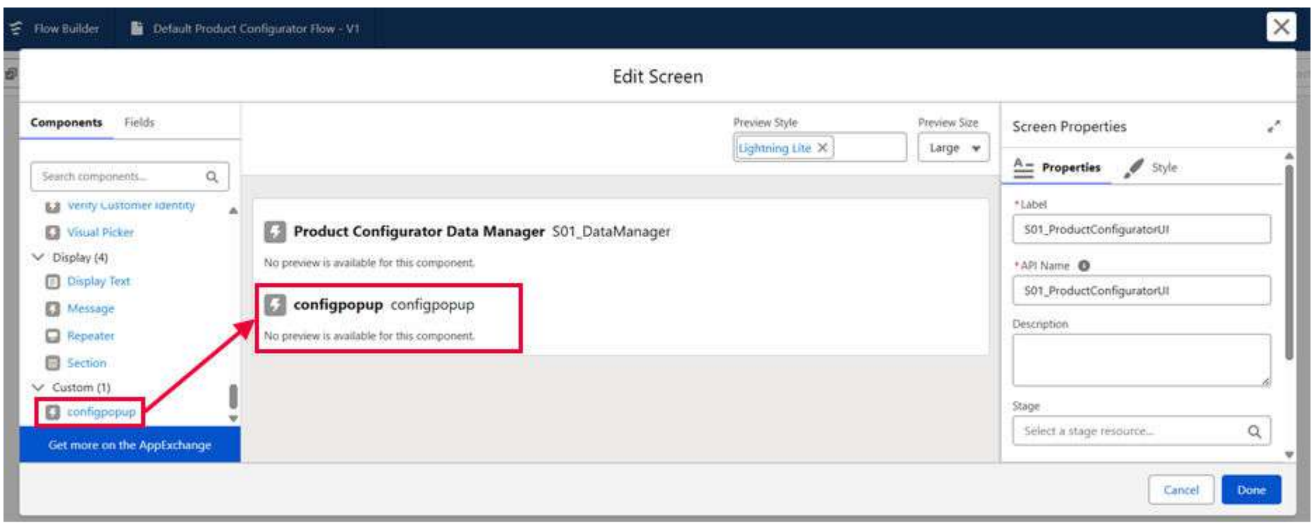


2. From the list of flows, search for **Default Product Configurator Flow**.
3. Open **Default Product Configurator Flow** and click **S01_ProductConfiguratorUI** screen flow.

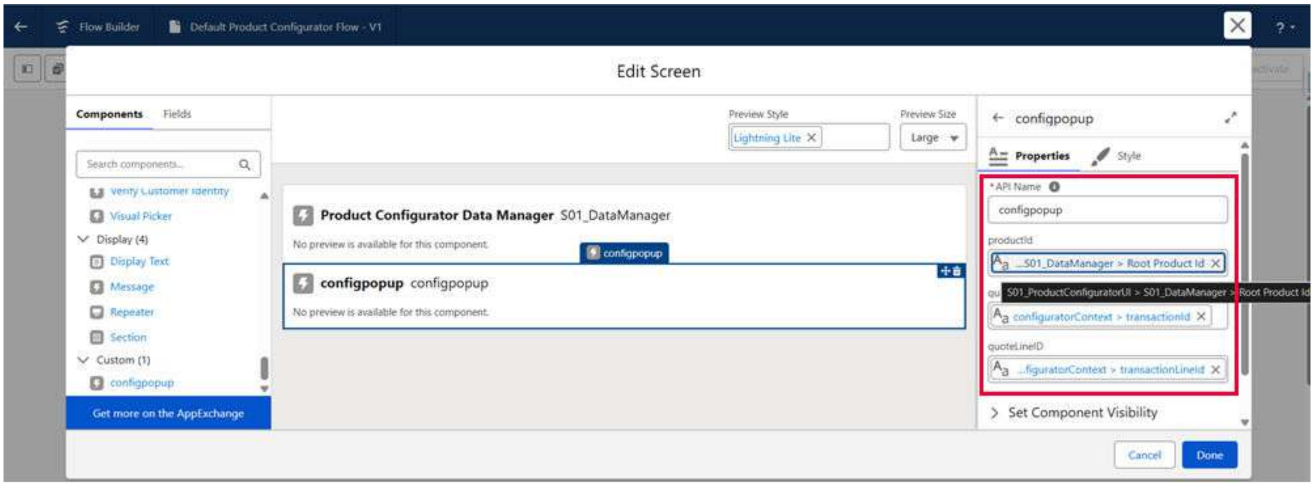


The **Edit Screen** page opens.

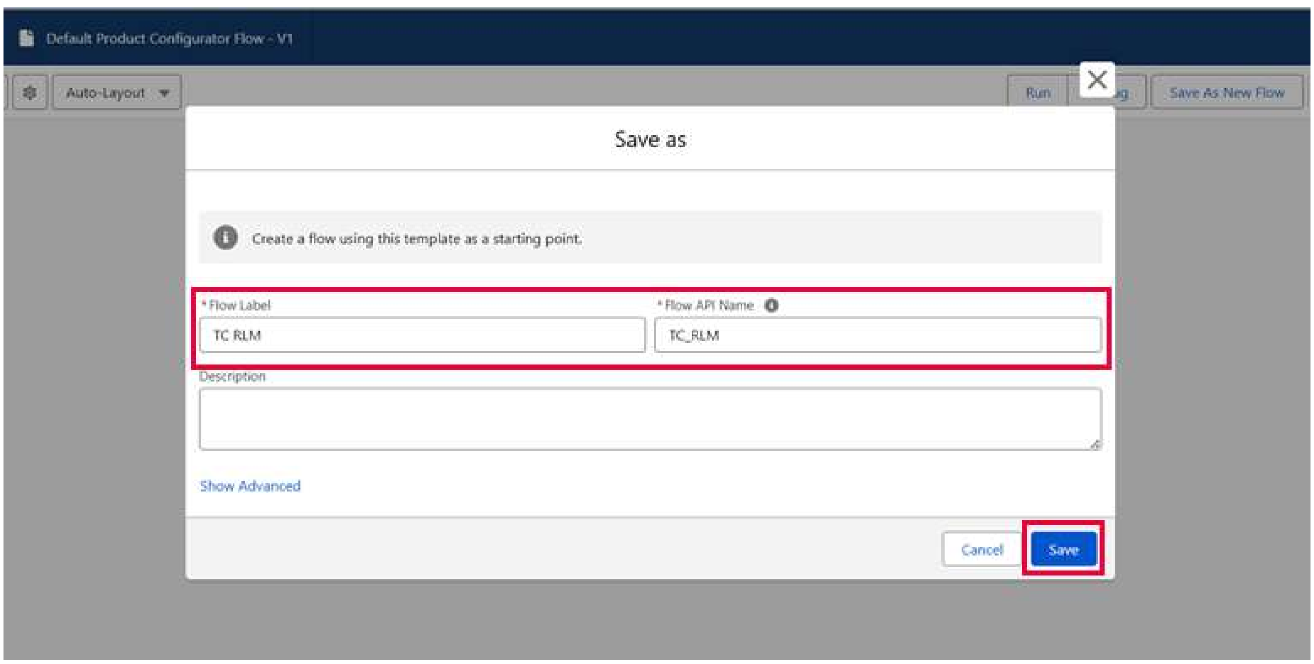
4. On the **Edit Screen** page, remove all properties expect **Product Configurator Data Manager**.
5. From the left panel, under the **Components** tab, search for **Config Popup** and drag **Config Popup** below **Product Configurator Data Manager**.



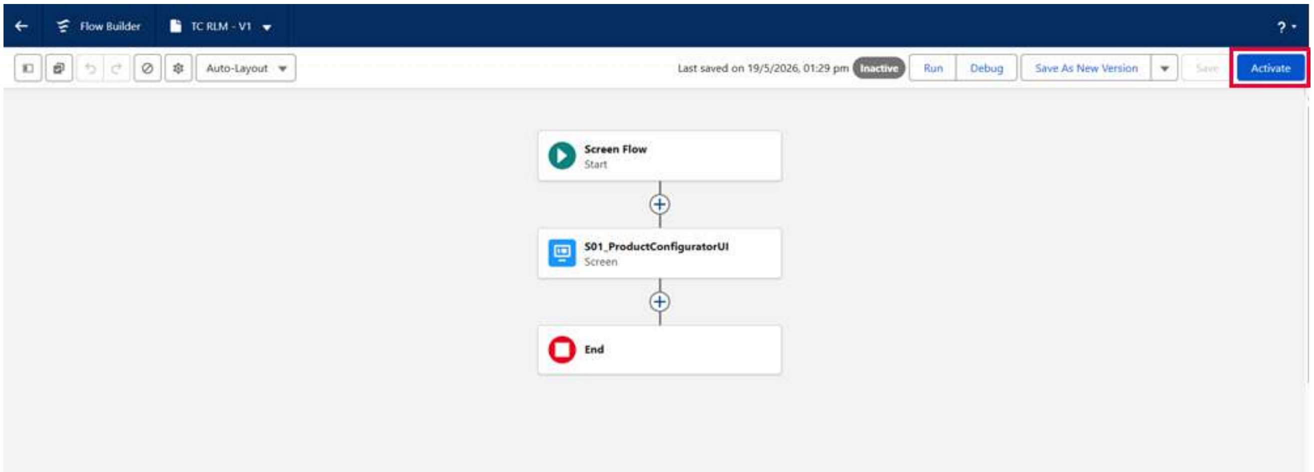
6. In the **Config Popup** panel on the right, set the following properties:
   a. In the **Product Id** field, select **!S01_DataManager.rootProductId**.
   b. In the **Quote Id** field, select **!configuratorContext.transactionId**.
   c. In the **QuoteLine** Id field, select **!configuratorContext.transactionLineId**.



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**.

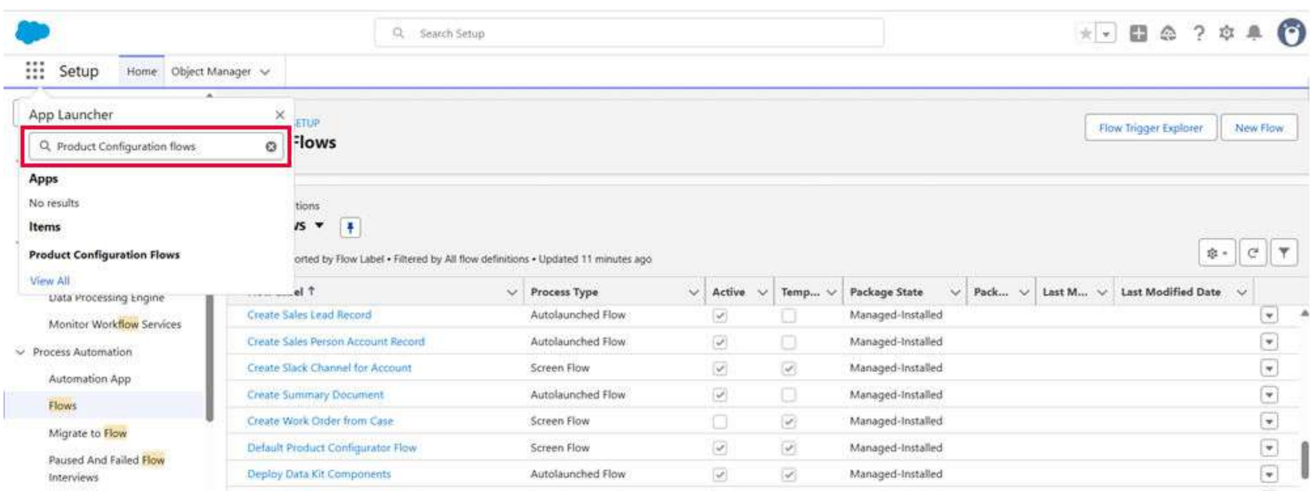


Enable custom configurator

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**.



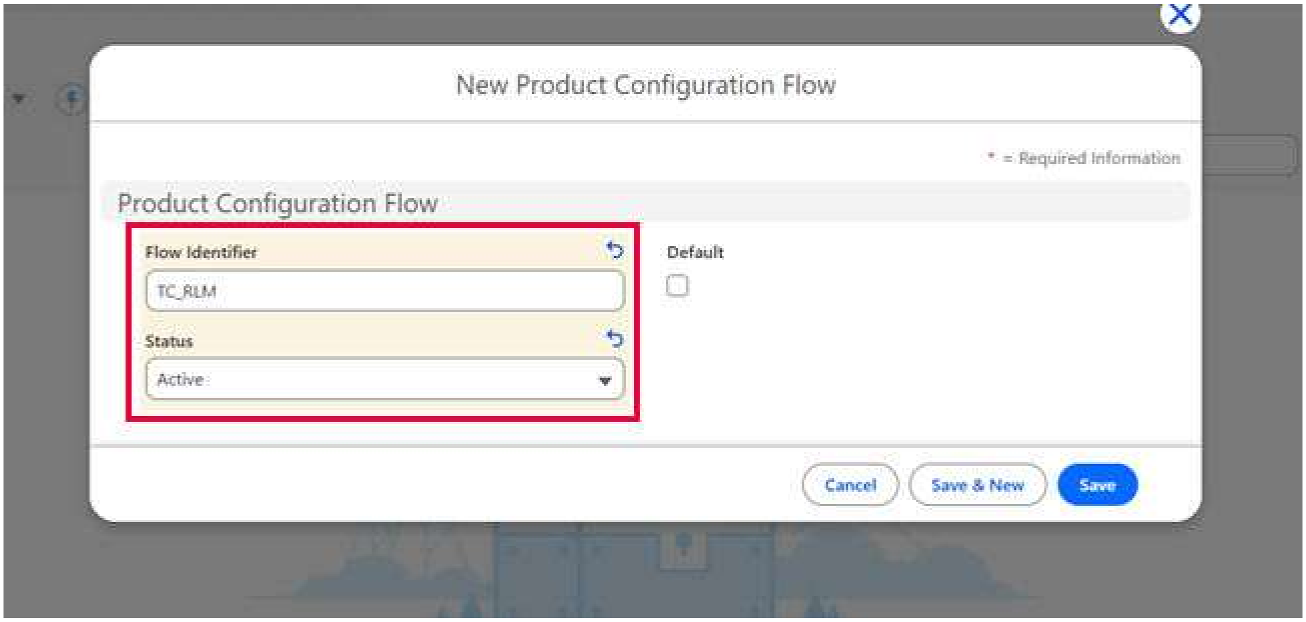
2. Open **Product Configuration Flows** and click **New**.
   The **New Product Configuration Flow** dialog box opens.

3. In the **New Product Configuration Flow** dialog box, enter the following information:

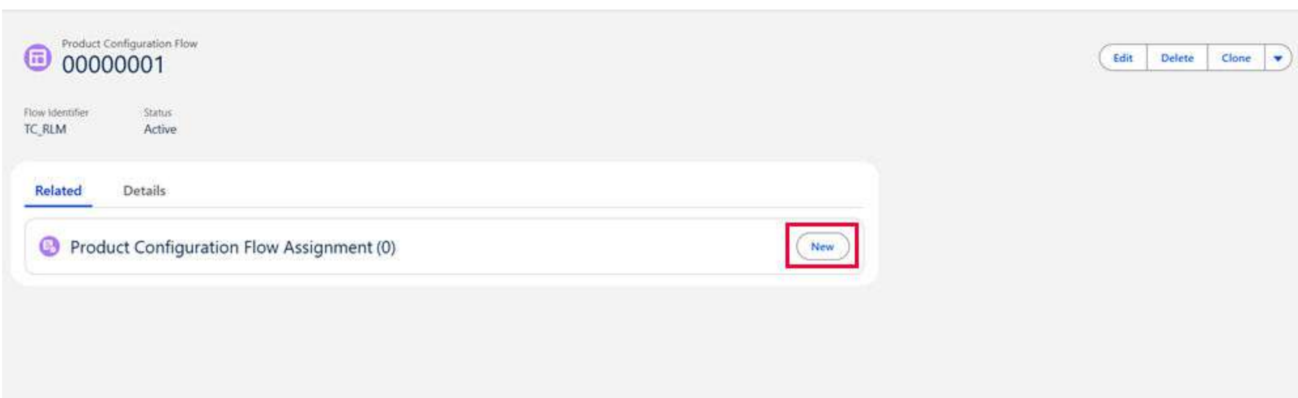
   a. In the **Flow API Name** field, enter **TC_RLM**.

   b. In the **Status** field, select **Active**.

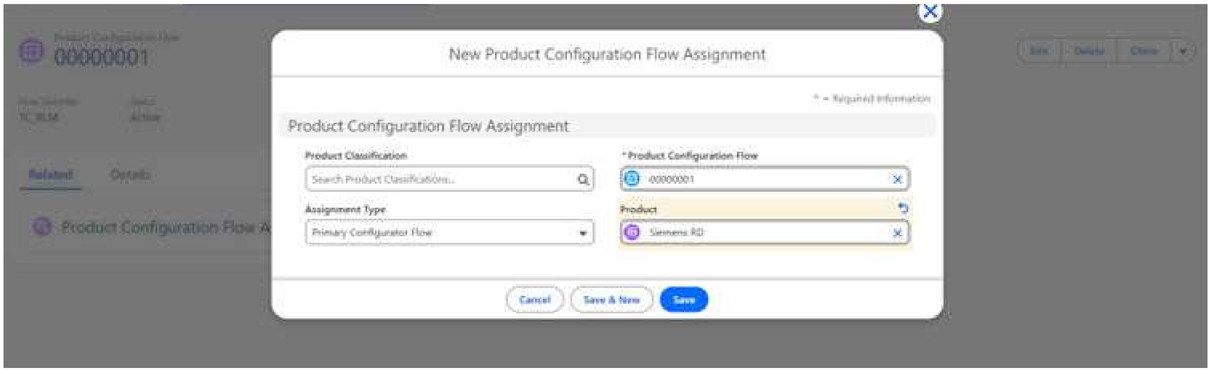
> **Note**
>
> If you select the **Default** check box, the custom configurator displays for all products.



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.


New Product Configuration Flow Assignment
Product Configuration Flow Assignment
Product Classification
Search Product Classifications...
* Product Configuration Flow
00000001
Assignment Type
Primary Configurator Flow
Product
Siemens RD
Cancel
Save & New
Save

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