SAP Qualtrics Integration for Lead to Cash Scenarios – Template

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## INTRODUCTION

SAP Qualtrics integration for Lead to Cash scenario helps to connect SAP Qualtrics with C/4 HANA products like SAP Sales Cloud, SAP CPQ, SAP Marketing Cloud etc.

The purpose of this document is to describe the general steps required to set up the configurations within the system landscape, using the corresponding installation or configuration guides.

The integration package runs on the SAP Cloud Platform tenant and collects the survey feedback from SAP Qualtrics. This data is then transformed and send to C/4 HANA products. These are template integration flows that help customers to obtain a general overview of how to connect different systems with SAP Qualtrics
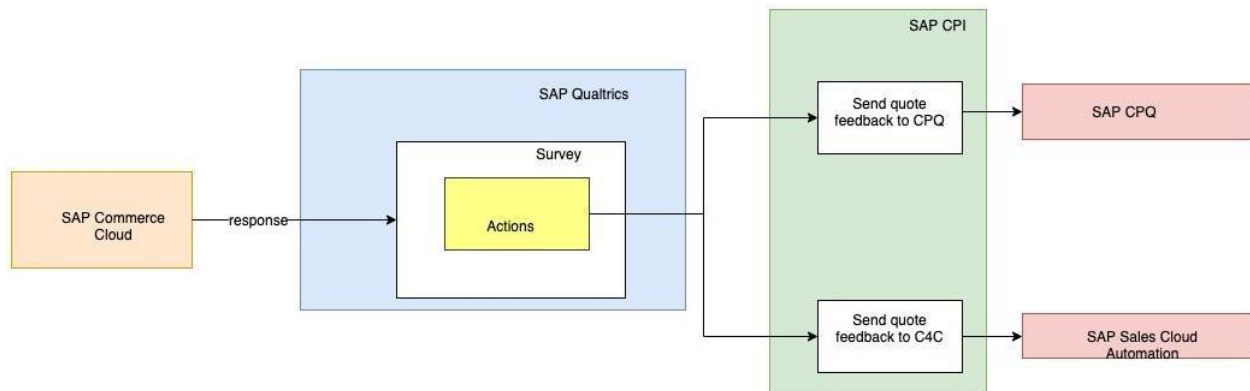
On receiving a survey response, a new action would triggered in SAP Qualtrics. You can configure a webservice task for this action which sends the formatted survey response to SAP Cloud integration flow configured. Integration flow formats the payload, collect additional details from SAP Commerce Cloud and pushes the data to SAP CPQ, SAP Sales Cloud etc.

Prerequisites

The template integration flows available in this packageare used to capture the quote experience for the Lead to Cash process. SAP Commerce Cloud should be integrated with SAP CPQ for B2B Quote management. You should also have a SAP CPI tenant available for deploying and configuring your integration flows and an active SAP Qualtrics license for developing survey projects.

As we are sending the SAP Qualtrics feedback to SAP CPQ and C4C Sales Cloud, accounts should be available in the respective products for configurations.

Setting up SAP Commerce Cloud

> The steps mentioned below are based on the template integration packages published in SAP API Hub. These Commerce Cloud configurations are for reference and should be change according to the customer scenario.

SAP CPQ Configurations in SAP Commerce Cloud

SAP Commerce Cloud should be integrated with SAP CPQ for quote management. This integration is available out of the bot. You need to enable and configure SAP CPQ extensions. Refer to SAP CPQ Integration Module for the steps to enable this integration.

Set up Qualtrics Configurations in SAP Commerce Cloud

SAP Commerce should be integrated with SAP Qualtrics to receive the feedback in the commerce storefront. This integration is available out of the box. You need to enable and configure SAP Qualtrics extensions. Refer SAP Qualtrics Integration Module for the steps to enable this integration.

Modify JSP pages

Few jsp pages need to be modified in SAP Commerce Cloud to pass embedded data from SAP Commerce Cloud to SAP Qualtrics. This embedded data provides a context with which the customer feedback can analysed in SAP Qualtrics. To understand more about embedded data, read Set embedded data section.

1. Add `js-qualtricsQuoteId` html id tag in `bin/modules/b2b-accelerator/b2bacceleratoraddon/ acceleratoraddon/web/webroot/WEB-INF/tags/responsive/order/accountOrderDetailsOverview.tag`.

```
<div class="item-group">
    <c:if test="${orderData.quoteCode ne null}">
        <spring:url htmlEscape="false" value="/my-account/my-quotes/${orderData.quoteCode}" var="qu
        <ycommerce:testId code="orderDetail_overviewQuoteId_label">
            <span class="item-label"><spring:theme code="text.account.quote.code"/></span>
            <span class="item-value">
                    <a id="js-qualtricsQuoteId" href="${fn:escapeXml(quoteDetailUrl)}" >
                        ${fn:escapeXml(orderData.quoteCode)}
                    </a>
            </span>
        </ycommerce:testId>
    </c:if>
</div>
```

2. Add `js-QualtricsEmailId` html id tag in `bin/custom/yb2bacceleratorstorefront/web/webroot/WEB-INF/views/responsive/pages/checkout/checkoutConfirmationThankMessage.jsp`.

```
<div class="checkout-success__body">
    <div class="checkout-success__body__headline">
        <spring:theme code="checkout.orderConfirmation.thankYouForOrder" />
    </div>
    <p><spring:theme code="text.account.order.orderNumberLabel"/><b> ${fn:escapeXml(orderData.code)}</b></p>
    <p><spring:theme code="checkout.orderConfirmation.copySentToShort"/><b id="js-QualtricsEmailId"> ${fn:escapeXml(email)}</b></p>
</div>
```

Setting up SAP Qualtrics

> 🛈 The steps mentioned below are based on the template integration packages published in SAP API Hub. These Qualtrics configurations, survey questions and embedded data are for reference and should be change according to the customer scenario.

You need to set up a Qualtrics Survey project and Qualtrics Website/App Feedback project for this integration. Design your survey, set up embedded variables to capturing survey metadata and set up actions in your survey project. In the Website/ App feedback project, design the creative, set up conditions in your interceptor and activate it.

Set up a survey project in SAP Qualtrics

To set up a new survey project, refer to Survey Basic Overview. The template integration package is based on below survey configurations in SAP Qualtrics.
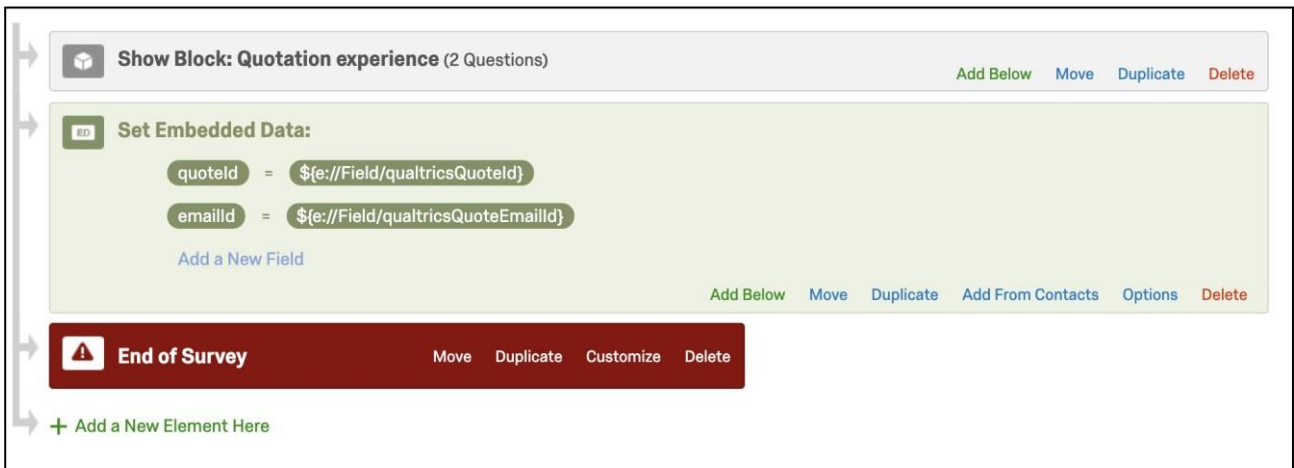
Set survey questions

This survey has two questions. First question is of NPS Score Type and captures customer's overall experience during the quotation journey. If the customer is a detractor (NPS score below 7), a second question would be asked to understand the reasons for the rating.

Set embedded data

You need to set up embedded data for SAP Qualtrics to have some context while processing the survey response Refer to Embedded Data to understand how to set up embedded data in a survey project. . For this template integration, quote ID and the customer email address are send from Commerce to SAP Qualtrics.

Once the embedded data is configured, survey response also include values for those variables.

For SAP Qualtrics to read these embedded from SAP Commerce Cloud, you might need to add a div id to the html elements in the corresponding jsp. Refer Setting up Modify the JSP pages section

Set Actions

You need to set up actions to send feedback from SAP Qualtrics to SAP CPI. To read more about actions, refer Actions Basic Overview. This template integration, contains Actions with `Web Service Task`.
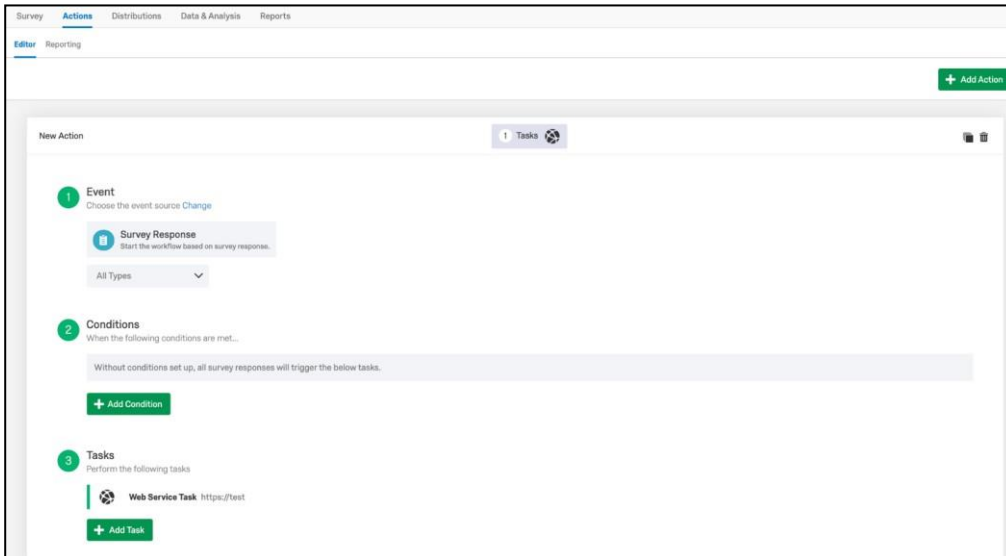
While setting up the Web Service task, remember to create a new authorization. This is done by going to Auth ➐ `Create New Auth`. Select `Type` as `Basic Auth`. Fill in the details.
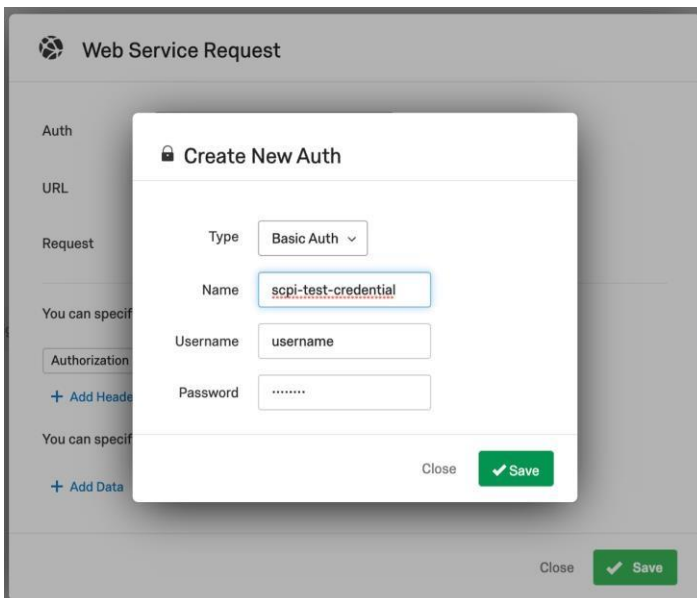
The user configured in the above step should also be available in SAP CPI with sufficient roles. To create a new user in SAP CPI, refer Creating a User for Cloud Integration.

For the payload, click on `Add Data` button, specify the key and the value. This JSON payload is sent to the configured target endpoint. The quote ID and the feedback received from SAP Commerce Cloud are sent as JSON payload to the template integration iflows.

Set up a Website/App feedback project in SAP Qualtrics

To set up a new Website/ App Feedback project, refer Creating a Website / App Feedback Project. Creatives and Intercepts are designed to capture customer's feedback in SAP Commerce Cloud

Design Creatives

A Creative is used to display SAP Qualtrics survey in SAP Commerce Cloud. To set up a new creative, refer Navigating the Creatives Tab. The creative type used in the template is `Pop Over`, you can also use a `Slider` or a `Responsive Dialog`.

Design Intercepts

An intercept has action sets that connect a creative to the survey. Action set also has an intercept logic display section. For this template integration package, below configurations have to be maintained.

- Check if the current URL in the website is '/orderConfirmation'.

- Check if the quote Id is present in the page using the jQuery expression `$('#js-qualtricsQuoteId')[0].text.trim()` not empty. This will help to prevent the Qualtrics survey from appearing on the Commerce storefront screen, if the customer placed an order without requesting for a quote.

- Select the creative previously designed from `Select a Creative to show` dropdown.

- Select the Qualtrics survey previously designed as a `target link` for your creative.

It is also important to define embedded data for this action set. To set the embedded data refer Embedded Data in Website Feedback. For this template integration package, two such variables are defined. These variables are referenced in Set embedded data.

- qualtricsQuoteId
- qualtricsQuoteEmailId

Setting up SAP CPQ

> The steps mentioned below are based on the template integration packages published in SAP API Hub. These CPQ configurations are for reference and should be change according to the customer scenario.

SAP CPQ has to be modified to capture the feedback send by SAP Qualtrics. A new custom field has to be created in the `Quote` object to persist customer feedback. To create a custom field in **SAP CPQ**, refer Quote item custom fields. For this template integration, a field named `Customer Feedback` has been created.

Setting up SAP Sales Cloud

You do not need any special set up in SAP Sales Cloud for this template integration.

Setting Up SAP Cloud Integration

The integration flows defined in this package has to be copied to costomers workspace, configured and deployed.

Manage Security material

You have already created a technical users in **SAP Commerce Cloud**, **SAP CPQ** and **SAP Sales Cloud** to access respective API endpoints . These user credentials must be stored in SAP Cloud Integration tenant as User Credentials. For details refer to Deploying / Editing a User Credentials Artifact.

Add integration package to workspace

Template integration package can be copied to customer's workspace by refering to Add Integration Packages to the Customer Workspace

SAP Cloud Integration Runtime URL

In the SAP Cloud Integration Web UI, perform the following.

1. Navigate to Monitor.
2. Select the Manage Integration Content - Started tile.
3. Search for the iflow names available in this template package.
4. The URL will be listed under the Endpoints section

Configure Send Quote Feedback from SAP Qualtrics to SAP Sales Cloud integration flow

To configure, choose Configure in the Actions column for this artifact and enter following specifications.

Receiver	Field Name	Receiver Value
CommerceCloud	Commerce Cloud URL	Commerce Cloud URL of your ccv2 instance
	Credential Name	Credential configured for SAP Commerce Cloud from Manage Security material
c4c	Sales Cloud Host	SAP Sales Cloud host URL
	Credential Name	Credential configured for SAP Sales Cloud from Manage Security material

Configure 'Send Quote Feedback from SAP Qualtrics to SAP CPQ' integration flow

To configure, choose `Configure` in the `Actions` column for this artifact and enter following specifications:

Configure the Receiver tab

Field Name	Receiver Value
Commerce Cloud URL	Commerce Cloud URL of your ccv2 instance
Credential Name	Credential configured for SAP Commerce Cloud from Manage Security material

Under `More` section, select type as `All Paramaters`.

Field Name	Receiver Value
SAP CPQ Credential Name	Credential configured for SAP CPQ from Manage Security material
SAP CPQ Domain Name	SAP CPQ domain name
SAP CPQ URL	SAP CPQ tenant URL

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