

# Oracle CPQ Commerce Essentials LVC

Oracle Configure, Price, and Quote (CPQ) Cloud

DURATION

**1 Days**

MODULES

**19 Lectures**

COURSE CODE

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## Course Overview

CPQ Administrators can use this course to gain proficiency in core functions needed to implement Commerce functionality on their CPQ site. Key topics covered in this course include implementing an introduction to the Commerce process in CPQ, working with Commerce attributes, using the Commerce Layout Editor to create transaction layouts, using Commerce actions, understanding Commerce process steps, participant profiles, and step transitions, using Commerce rules, using Commerce formulas, and modifying Commerce attribute values.

## What You Will Learn

### Module 1: Commerce Actions Essentials

- Objectives
- Commerce Actions Overview
- Types of Commerce Actions
- Commerce Action Use Case
- Adding Actions
- Commerce Action Editor Tabs
- General Tab
- Modify Tab
- Destination Tab
- Integration Tab
- Document Views Tab
- Performance Tab
- Summary

### Module 2: Commerce Attributes Essentials

- Objectives
- Commerce Attribute Data Types
- Reference Application Preconfigured Attributes
- Adding Commerce Attributes

- Commerce Attribute Editor Tabs
- General Tab
- Default Tab
- Modify Tab
- Document Views Tab
- Mapping Tab
- Summary

### Module 3: Commerce Complex Attributes

- Objectives
- HTML Attribute
- Common Applications
- Defining HTML Content (Simple & BML-Generated)
- HTML Considerations
- File Attachment Attributes
- Properties & Limitations
- Currency Attributes
- Stored & Displayed Precision
- Hover Tooltip
- Rounding Considerations
- RTE Templates for JET Transaction UI
- Basic Functions
- Creating, Inserting, Renaming, Deleting Templates
- Summary

### Module 4: Commerce Complex Formulas

- Objectives
- What Is a Function?
- Nested Functions
- Math Functions & Editor
- Boolean & String Functions
- Formulas with Conditionals
- Defining Conditions
- Nested Conditionals
- Query Function
- Details Editor, Conditions, Return Values
- Summary

### Module 5: Commerce Constraint Rules

- Objectives
- Constraint Rule Use Case
- Accessing Commerce Rules
- Rule Editor Window & Properties
- Constraint Rule Use Case Results

- Summary

## Module 6: Commerce Process Essentials

- Objectives
- Commerce in the CPQ Process
- Commerce & Commerce Process Definition
- Major Components & Order of Operations
- Process Actions
- Oracle Quote to Order Manager
- Transaction Layout
- Commerce Rules & Actions
- Approval Process
- Steps & Participant Profiles
- Administration Navigation & Quick Links
- Summary

## Module 7: Commerce Formulas Essentials

- Objectives
- Formula Management & Use Case
- Formula Management Basics
- System and Version Attributes
- Building a Basic Formula
- Formula Input Options
- Adding a Formula to an Action
- Formula Elements & Operators
- Summary

## Module 8: Commerce Hiding Rules

- Objectives
- Hiding Rule Use Case
- Accessing Commerce Rules
- Rule Editor Window & Features
- Use Case Results
- Summary

## Module 9: Commerce Layout Editor

- Objectives
- What is the Commerce Layout Editor?
- Accessing the Editor
- Panels, Tabs, Columns, Column Settings
- Spacers and Toolbars
- Line Item Grid & Column Management
- Deploying Commerce: Quick Links & Deployment Center
- Summary

## Module 10: Commerce Line Item Filtering Rules

- Objectives
- Line Item Filtering Rule Use Case
- Accessing Commerce Rules & Rule Editor
- Enabling New Filter Rules
- Use Case Results
- Summary

## Module 11: Modifying Attribute Values

- Objectives
- Action Modify Tab Overview
- Run Validation Before Modify
- Advanced Modify Basics
- Transactions, Line Items, Document Numbers
- Advanced Modify Return Format & Timeout
- Looping Over Line Items & Using Formulas
- Summary

## Module 12: Process Action & Invocation

- Objectives
- Process Actions & Types
- Process Invocation & Page List
- Creating Invocation Actions & Rules
- User Access Rights
- Summary

## Module 13: Commerce Rules Essentials

- Objectives
- Types of Commerce Rules
- Accessing Rules & Rule Editor
- Related Rules: Attributes & Actions
- Summary

## Module 14: Transaction & Transaction Line Defaults

- Objectives
- BML and Formulas Together
- New Transactions & Attribute Default Tab
- Main Document & Line Advanced Defaults
- Run Once For All Line Items
- Summary

## Module 15: Commerce Validation Rules

- Objectives
- Validation Rule Use Case
- Accessing Rules & Rule Editor Window
- Features & Use Case Results
- Summary

## Module 16: Importing & Exporting Line Items

- Objectives
- Exporting Line Items
- Full & Filtered Exports
- Export Action Configuration
- Importing Line Items
- Summary

## Module 17: Steps & Participant Profiles

- Objectives
- Steps and Transition Rules
- Participant Profile Views & Best Practices
- Accessing & Decommissioning Steps
- Profile Management
- Summary

## Module 18: Transition & Auto-Forwarding Rules

- Objectives
- Transition Rules & Notifications
- Auto-Forwarding Rules & Types
- Adding Rules & Conditions
- Auto-Forwarding Example
- Summary

## Module 19: Troubleshooting Commerce Rules

- Objectives
- Troubleshooting Strategy
- Debugging with Favorite IDs
- Pipeline Viewer
- Transaction ID Tracking
- Summary