

Oracle CPQ Configuration Essentials LVC

Oracle Configure, Price, and Quote (CPQ) Cloud

DURATION

1 Days

MODULES

22 Lectures

COURSE CODE

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Course Overview

CPQ Administrators can use this course to gain proficiency in core functions needed to implement Configuration functionality on their CPQ site. Key topics covered in this course include working with parts/items, using bulk upload and download capabilities, creating the product hierarchy within CPQ, using configurable attributes and arrays, creating Configuration flows, understanding the different Configuration flow Wizard Node types, and using the Configuration Layout Editor to display the configurable products to your users, using Configuration rules, implementing BOM mapping, and using Single Select Pick Lists (SSPL).

What You Will Learn

Oracle CPQ Configuration Layout Editor

- Objectives
- Configuration Flow Layout Editor
- Accessing the Layout Editor
- Layout Editor Options
- Layout Properties
- Managing Editor Windows
- Adding Tabs
- Adding Grids
- Grid/Group Title: Example
- Grid Management
- Adding Attributes
- Boolean Attribute Display Options
- Numeric Attribute Display Options
- Image Menu Display Options
- Accessing Layout Element Editors
- Editing Layout Elements
- Attribute Properties
- Editing Elements
- Saving the Layout Editor

- Previewing the Layout
- Summary

Oracle CPQ Working with BOM Mapping Rules

- Objectives
- BOM Mapping Configuration Rules
- Creating a BOM Mapping Configuration Rule
- BOM Mapping Rule Name
- Table-Based BOM Mapping Configuration Rules
- BML-Based BOM Mapping Configuration Rules
- BOM Item Definition Tree References
- BOM Item Mapping Tree References
- Demonstration: Creating a BOM Mapping Rule
- Summary

Oracle CPQ Implementing BOM Mapping

- Objectives
- BOM Mapping Implementation Process
- Data Table Schemas for BOM Mapping: Sample
- Capturing the BOM Definition
- Demonstration – Creating BOM Mapping Data Tables
- Summary

Oracle CPQ Single Select Pick Lists (SSPL)

- Objectives
- Single Select Pick Lists (SSPLs)
- Basic SSPL Attribute Settings
- Example: Using a Data Table with an SSPL Attribute
- Using a Column in the Data Table for Image References
- Filters in SSPL Attribute Definitions
- Filtering Syntax
- Using \$and and \$or in Filters
- End Users Can Also Use “Type to Filter”
- Adding a Pick Map to an SSPL Attribute
- End User View of Multiple SSPL Attributes Used for Drill-Down
- Other Examples of Drill-Down
- Setting the Value of an SSPL
- Set the Value of an SSPL Using a Punch-In Value
- Set the Value of an SSPL by Using a Recommendation Rule Action
- Apply Message Properties to SSPL in Configuration
- Set the Value of an SSPL Attribute by Using a SOAP API
- Sort the Order of Display Values for Data Table-Based SSPL
- Single Select Pick List Result Limit
- Use SSPL Attributes in Simple Conditions for Config Rules

- Use SSPL Attributes in Advanced Conditions for Config Rules – Add Attributes
- Use SSPL Attributes in Advanced Conditions for Config Rules – Add Row
- Summary

Oracle CPQ Working with BOM Mapping Tables

- Objectives
- Activating BOM Platform Tables
- Mapping BOM Data Tables to BOM Platform Tables
- Successful BOM Mapping
- Validating BOM Definitions
- Validation Example: BOM Item Tree Administration Page
- Validation Example: BOM Item Administration
- Validation Example: BOM Attribute Administration Page
- Summary

Oracle CPQ BOM Mapping Essentials

- Objectives
- Bill of Materials (BOM): Introduction
- BOM Mapping: Overview
- BOM Mapping
- Hierarchical Relationships in BOM Mapping
- BOM Platform Tables
- BOM Item Definition Table
- BOM Item Mapping Table
- Product Lines and Models
- BOM Attribute Mapping Table
- BOM Attribute Translation Table
- BOM Mapping Table Relationships
- BOM Mapping Use Cases
- Basic BOM Mapping Configuration Process Flow
- Basic BOM Mapping Reconfiguration Process Flow
- Full-Service BOM Mapping Configuration Process Flow
- Full-Service BOM Mapping Reconfiguration Process Flow
- Summary

Oracle CPQ Configuration Flow Essentials

- Objectives
- What Are Configuration Flows?
- Wizard Node Types
- Multiple Configuration Flows
- Configuration Flows: Example 1
- Multiple Configuration Flows: Example 2
- Configuration Flow: Example User Side
- Creating a Configuration Flow

- Summary

Oracle CPQ Managing Configurable Attributes

- Objectives
- Attribute – Related Rules
- Attribute – Related Rules
- Ordering and Deleting Attributes
- Attributes: Best Practices
- Variable Name Notes
- Summary

Oracle CPQ Working with Configurable Attributes

- Objectives
- Adding a New Configurable Attribute
- Adding New Attributes
- Menu Attribute Types
- Editing an Attribute – Attribute Editor
- Attribute Properties
- Attribute Display Options
- Attribute Menu Images
- HTML Attributes: Basics
- HTML Attributes and BML
- HTML Attributes: Use Case
- Summary

Oracle CPQ Configurable Attribute Essentials

- Objectives
- What Are Configurable Attributes?
- Configurable Attributes
- Configurable Attribute Data Types
- Configurable Attribute Types
- Summary

Oracle CPQ Product Hierarchy

- Objectives
- Product Definition and Catalog Definition
- Linear Hierarchy
- Tree-like Hierarchy
- Product Hierarchy: Best Practices
- Defining a Product Family
- Add Support (Activate) the Product Family
- Home Page Deploy
- Product Lines and Models
- Adding a Product Line

- Adding a Model
- Configuration Quick Links
- Summary

Oracle CPQ Part Essentials

- Objectives
- What Is a Part?
- Part Data
- Creating Part Data
- Adding Parts to a Quote
- Adding Parts to a Quote Via Data Table Query
- Table-Based Rule Example: User Side
- Parts Link
- Adding a Part
- Entering Part Information and Adding a Part
- Part-Attribute Associations
- Part-Attribute Notes
- Summary

Oracle CPQ BOM Mapping Rules Essentials

- Objectives
- BOM Item Configuration Rules
- BOM Attribute Configuration Rules
- BOM Mapping Rule Execution
- Multiple BML Rules
- Effective Dates
- Mapping to Array Type Attributes
- BOM Pricing
- Define BOM Prices
- JavaScript Object Notation (JSON)
- JSON Syntax
- JSON Data Structures
- JSON Data Types
- BOM Instance
- BOM Instance Structure
- BOM Instance System Fields
- BOM Structure
- Quantity Fields
- Summary

Oracle CPQ Managing Configuration Rules

- Objectives
- Related Rules – Configuration Attributes
- Configuration Rule Precedence

- Recommendation Rule Order
- Attribute Dependencies
- Identify Conflicts
- Related Rule Components
- Recommendation Rule Conflicts
- Recommendation Rule Priority
- Recommendation Rule Priority: Example
- Recommendation Rule Set Type: Conflicts
- Hiding and Constraint Conflicts
- Resolving Internal Constraints
- Summary

Oracle CPQ Configuration Recommended Items Rules

- Objectives
- Recommended Items Rules
- Types of Recommended Items Rule
- Recommended Items Rule Use Case
- Accessing Configuration Recommended Items Rules
- Rule Editor Window
- Recommended Items Rules: Properties
- Recommended Items Rule Use Case
- Recommended Items Rule Use Case Results
- Table-Based Rule Use Case: Multiple Inputs
- Steps to Create a Table-Based Rule
- Summary

Oracle CPQ Configuration Recommendation Rules

- Objectives
- Recommendation Rules
- Recommendation Rule Use Case
- Accessing Configuration Recommendation Rules
- Rule Editor Window
- Recommendation Rules: Properties
- Recommendation Rule Use Case
- Recommendation Rule – BML Script
- Recommendation Rule Use Case Results
- Summary

Oracle CPQ Configuration Hiding Rules

- Objectives
- Hiding Rules
- Hiding Rule Use Case
- Accessing Configuration Hiding Rules
- Rule Editor Window

- Hiding Rules: Properties
- Hiding Rule Use Case
- Hiding Rule Use Case Results
- Summary

Oracle CPQ Configuration Constraint Rules

- Objectives
- Constraint Rules
- Constraint Rule Use Case
- Accessing Configuration Constraint Rules
- Rule Editor Window
- Constraint Rules: Properties
- Constraint Rule Use Case
- Constraint Rule Use Case Results
- Summary

Oracle CPQ Working with Configuration Rules

- Objectives
- Creating Rules
- Adding a Rule
- Rule Conditions
- Condition Types
- Simple Conditions
- Simple Logic with Grouping
- Row Grouping
- Action Attributes
- Rule: Best Practices
- Summary

Oracle CPQ Configuration Rules Essentials

- Objectives
- What Are Configuration Rules?
- How Configuration Rules Work
- Constraint Rules
- Recommendation Rules
- Hiding Rules
- Recommended Items Rules
- Recommendation Rules Versus Recommended Items Rules
- Simple Rules and Table-Based Rules
- What Are Table-Based Rules?
- Table-Based Rule Example
- Table-Based Rule Example: User Side
- Table Structure/Schema
- Table Lookup Rules: Basics

- When Is BML Required?
- BML Table Lookup: Use Case
- Rule List Administration Interface
- AJAX Configuration Rules
- AJAX Rules: Best Practices
- Accessing Configuration Settings
- Configuration Settings
- Pending Configurations Settings
- Summary

Oracle CPQ Configurable Attribute Arrays

- Objectives
- Configurable Attribute Arrays
- Array Components
- Adding an Array Set
- Associating Attributes with an Array Set
- Displaying Indicator Icons for Editable Fields
- Controlling Page Size for Configuration Arrays
- Manage Columns for Configuration Vertical Arrays
- Manage Rows for Configuration Horizontal Arrays
- Freezing Columns for Configuration Vertical Arrays
- Hiding Columns for Configuration Vertical Arrays
- Hiding Rows for Configuration Horizontal Arrays
- Summary

Oracle CPQ Bulk Data Services

- Objectives
- Bulk Data Upload/Download
- Accessing Bulk Data Download Services
- Bulk Download Categories
- Selecting a Download Type
- Bulk Download Status
- Bulk Data Upload: Best Practices
- Accessing Bulk Data Upload Services
- Bulk Data Upload File Selection
- Bulk Data Upload Logs
- Summary