Oracle CPQ Document Designer Essentials LVC

Oracle Configure, Price, and Quote (CPQ) Cloud

DURATION	MODULES	COURSE CODE
1 Days	18 Lectures	—

Course Overview

CPQ Administrators can use this course to gain proficiency in core functions needed to implement Document Designer functionality on their CPQ site.Key topics covered in this courseinclude creating Document Designer templates, using the Document Designer layout editor, using different layout components in the layout editor, using different element components in the layout editor, using conditions and loops in the layout editor, and using XSL snippets in the layout editor.

What You Will Learn

Oracle CPQ Document Designer Essentials

- Objectives
- Document Designer in the CPQ Process
- What Is the Document Designer?
- Document Designer Output Example
- Sales User Document Designer Experience – Example
- Document Designer Administration
- Document Designer Implementation Considerations
- Summary

Oracle CPQ Working with Document Designer Templates

- Objectives
- How the Document Designer Process Works
- Creating and Setting Up Document Designer Output
- Step 1: Creating the Document Designer Template
- Step 2: Creating the Printer Friendly XSL View
- Step 3: Creating the Commerce Print Action
- Step 4: Deploying Commerce and Testing the Connection
- Previewing the Output
- Retrieving a Transaction ID
- Summary

Oracle CPQ Document Designer Layout Editor Essentials

- Objectives
- Document Designer Editor Overview
- Document Templates List
- The Document Designer Editor
- Admin Action Bar
- Previewing the Output
- Document Designer Components
- Properties Panel
- Dynamic Content Bar
- Template Flow
- Adding and Moving Layout Objects and Elements
- Moving Objects and Elements
- Layout Object and Element Palettes
- Managing Elements and Layout Objects in the Template Flow
- Copy and Paste
- Background Images
- Errors
- Summary

Oracle CPQ Document Designer – Section Layout Object

- Objectives
- Document Designer Components
- Types of Layout Objects
- Sections
- Continuous Sections
- Section Settings
- Columns
- Background Images
- Adding a Section – Before
- Adding a Section – After
- Summary

Oracle CPQ Document Designer – Table of Layout Object

- Objectives
- Document Designer Components
- Types of Layout Objects
- Table of
- Table of Settings
- Adding a Table of – Before
- Adding a Table of – After
- Summary

Oracle CPQ Document Designer – Header & Footer Layout Object

- Objectives
- Document Designer Components
- Types of Layout Objects
- Header & Footer
- Header & Footer Settings
- What Can be Added to a Header or Footer
- Adding a Header & Footer to a Document Designer Template
- Summary

Oracle CPQ Document Designer – Text Element

- Objectives
- Document Designer Components
- Available Elements
- Text
- Text Settings
- Text Columns
- Attribute Values
- Adding Attribute Values
- Adding Attribute Values – Hotkeys
- Embed RTE and HTML Attributes in Text Elements
- Adding Text- Before
- Adding Text – After
- Summary

Oracle CPQ Document Designer – Column Break Element

- Objectives
- Document Designer Components
- Available Elements
- Column Break
- Adding a Column Break
- Summary

Oracle CPQ Document Designer – Embed Document Element

- Objectives
- Document Designer Components
- Available Elements
- Embed Document
- Dynamically Embed External Documents
- Display Embedded Documents in a Transaction
- Adding a Document Map Attribute
- Filter Document Map Attribute
- Summary

Oracle CPQ Document Designer – Heading Element

- Objectives
- Document Designer Components
- Available Elements
- Heading
- Heading Style Sets
- Accessing Heading Style Sets and Heading Styles
- Heading Styles Window (Heading Style Set Selected)
- Heading Styles Window (Heading Style Selected)
- Numbering Options
- Number Placement Outputs
- Reset Numbering
- Table of Layouts and Heading Style Sets
- Summary

Oracle CPQ Document Designer – Image Element

- Objectives
- Document Designer Components
- Available Elements
- Image
- Image Settings
- Adding an Image to a Document Designer Template
- Summary

Oracle CPQ Document Designer – Page Break Element

- Objectives
- Document Designer Components
- Available Elements
- Page Break
- Adding a Page Break
- Summary

Oracle CPQ Document Designer – Spacer Element

- Objectives
- Document Designer Components
- Available Elements
- Spacer
- Spacer Settings
- Adding a Spacer – Before
- Adding a Spacer – After
- Summary

Oracle CPQ Document Designer – Table Element

- Objectives
- Document Designer Components
- Available Elements
- Table
- Table Settings
- Table Rows, Columns, and Cells
- Clearing, Merging, and Splitting Cells
- Embed RTE and HTML Attributes in Cells
- Nested Tables
- Adding a Table – Before
- Adding a Table – After
- Adding a Nested Table
- Editing Nested Table Properties
- View a Nested Table in Full View Mode
- Apply Conditions and Loops to Nested Tables
- Summary

Oracle CPQ Document Designer – Using Conditions

- Objectives
- Conditions and Loops
- Conditions
- Adding a Condition
- Boolean Attributes in Conditions
- Functions Available for Use in Conditions
- Summary

Oracle CPQ Document Designer – Using Loops

- Objectives
- Conditions and Loops
- Loops
- Adding a Loop
- Loop Options
- Functions Available for Use in Loops
- Adding a Filter to a Loop
- Nested Loops—Looping Over an Array Set
- Adding a Loop Over a Configuration Array
- Summary

Oracle CPQ Document Designer – XSL Snippet Element

- Objectives
- Document Designer Components
- Available Elements

- XSL and the Document Designer
- XSL Snippet
- XML Data in CPQ
- Accessing a Transaction’s Document XML
- XSL Locations in the Document Designer Editor
- Template XSL
- Global XSL Snippet
- Inline XSL Snippets
- XSL Use Case: Dynamic Signature Block
- Dynamic Signature Block Notes
- Summary

Oracle CPQ Creating Documents with Document Designer

- Objectives
- Prior to Continuing
- Lab Course
- Course Outcome
- Summary