1. Document Overview and Description
   1. Login and Profiles

The purpose of this document is to provide detailed technical specifications of the CPQ Implementation in Oracle CPQ including details on core configuration, portal, web site and integrations.

* 1. Audience

The intended audience of this document is all CPQ Implementation IT Team Members involved in requirement definition, design, configuration, or testing of the Oracle CPQ.

* 1. Key Terms

The intended audience of this document is all CPQ Implementation IT Team Members involved in requirement definition, design, configuration, or testing of the Oracle CPQ.

|  |  |
| --- | --- |
| Acronym | Description |
| UAT | User Acceptance Testing |
| CPQ | Configure Pricing Quoting |
| DEV | Development Environment in CPQ |
| PROD | Production Environment in CPQ |
| BML | Big Machines Language |
| CSV | Comma Separated Value |
| API | Application Programming Interface |
| HTTP | Hypertext Transfer Protocol |
| WSDL | Web Services Description Language |

* 1. Design Assumptions
  2. Key Dependencies

1. Quality of the migrated data will depend on the quality of the legacy data provided and the extent of any data cleansing.
2. Custom development and business workflow is dependent by CPQ limits. These limitations have been considered during design and can be monitored from within the Oracle CPQ.
   1. Related Documentation

The following table lists additional documents that contain related information and supporting program material

|  |  |
| --- | --- |
| Title | Description |
| Integration Strategy & Approach | Deliverable documenting the proposed integration with other boundary systems. |
| Environment Strategy & Approach | Deliverable that describes the approach to development, test and production environment management and release management. |

Insert index here:

Implementation Area

The following high-level section (configuration, commerce, integration, doc designer) defines the underline structure for the Oracle CPQ.

1. **Configuration.**

Configuration is the process of allowing users to customize a model to suit their needs. Using Configuration, the buyer can customize the items they are buying by specifying the values of configuration attributes.

Configuration attributes define the characteristics of Product Families that can be specified by the user. They are used in search flows, configuration flows, and every type of configuration rule. Attributes can be of float, integer, date, HTML or text data type, Menus.

Configuration attributes can be defined as stand-alone attributes or as arrays. Array attributes group multiple scalar attributes. Usually, the size of an array attribute is specified by a control attribute.

Rules enable you to set specific configuration information for your products.

The user experience in configuration is controlled by the ability to fire the appropriate rules based on user input. Different types of rules enhance the selection and configuration experience.

For example, you can suggest configured values to buyers using recommendation rules or hide some configuration attributes from certain user types. Rules can also be used to recommend items to buyers, prevent them from selecting opposite values of configuration attributes and display additional price information.

Configuration Flows are used to walk buyers through the Configuration Process. Configuration Flows help arrange and organize configuration attributes to make Configuration user-friendly. For products with large sets of configuration attributes, Configuration Flows can be used to group different attributes and display them on separate tabs. Configuration Flows can also be set up to direct users to different pages or flows based on their input selections.

BML libraries are extremely important in that they allow us to avoid duplicate code, and to easily maintain discrete logical operations. They are different than Advanced Modify functions and Advance Validation rules, and it may take some extra effort to reproduce errors.

Commerce

Commerce Processes are used to create templates for the selling processes used by your company.

With Commerce Processes, you set up your quoting, ordering, approval, and other workflow processes. By creating ordered sets of Commerce document templates, along with associated attributes and actions, you enable buyers and supplier agents to conduct transactions on your customized CPQ Cloud application.

Commerce actions trigger events within documents to occur. The Commerce system creates a default set of actions for use in each document, and generates additional actions when Commerce documents include certain attribute types.

Commerce attributes are the foundation for input fields for Commerce documents. They apply to a Transaction as a whole, or its specific line items, depending on in which Commerce document the attribute is created.

Commerce rules allow you to do things like limit the values in one field based on the selections in another and hide attributes based on other selections.

Workflow administration is the final step in setting up a Commerce Process. Workflows are made up of steps, which define the states transactions can be in, as well as document permissions and routing. Commerce Processes can have any number of workflow steps.

Workflow steps use profiles to define access rights, transition notification, and transaction views.

Printer Friendly/ History XSL views allow you to control the display of a transaction depending on the XSL template you select. You can create multiple XSL templates to produce different types of printer friendly proposal formats or transaction history outputs.

These XSL templates can be predefined in the actions used to generate the printer friendly proposal or history output. Alternately, you can allow the user to select templates at run time to generate varied outputs.

You can generate output as XML, RTF, PDF, XLS, HTML, or DOCX.

Integration for software applications, it typically refers to a process that tries to link, or share, data from different software applications. These applications include CRM and ERP software.

There are many benefits to integration, including:

* Streamlining the marketing and sales processes
* Organizing and updating customer information
* Preventing manual data entry
* Removing redundant, unnecessary or tedious everyday steps

The CPQ Cloud application can integrate with different types of applications, in different ways. Some integration needs can be handled by the default functionality within the software packages themselves, with some additional configuration. Other functionality may need to be built on a custom basis, depending on the business's needs and the limitations of the software.

3)File Manager

File Manager is an integral part of CPQ Cloud. You can upload any kind of file to the File Manager, organize files into folders, and access files from anywhere on the Internet. The File Manager is used for:

* External images
* JavaScript files linked to various areas on the site
* CSS Stylesheets for Configurations Flow Templates
* Excel spreadsheets (to hold master data)

4)Data Tables

Data Tables provide single-page administration which includes a spreadsheet-like user interface with easy editing capabilities, powerful search features that allow searches within a single table or across all tables, and enhanced performance and indexing.

5) Users

All users that require access to CPQ Cloud must have a specific user assigned to them. Users can be created and [maintained manually by admins](https://help.bigmachines.com/BMIHelp/Content/Manage_Users/SetUpUsers.htm), through bulk [upload](https://help.bigmachines.com/BMIHelp/Content/Administration/Bulk_Uploads.htm) /[download](https://help.bigmachines.com/BMIHelp/Content/Administration/Bulk_Downloads.htm), or through [user integration with a CRM system](https://help.bigmachines.com/BMIHelp/Content/Manage_Users/UserIntegration.htm).

Users can be created for the Host Company or Partner Organizations.

Users cannot be deleted, but they can be inactivated.

Both active and inactive Host Company users can be created, activated/inactivated, viewed, or modified on the User Administration List page.

5) Groups

Groups are a collection of users and are useful for determining access rights for Commerce documents.