Oracle CPQ Cloud: Advanced Document Designer Rel 16.1 Ed 1

Duration: 1 Day

What you will learn

This Oracle CPQ Cloud: Advanced Document Designer Rel 16.1 Ed training prepares administrators to create and maintain Document Designer templates. You will learn how to create a Document Designer template and the supporting elements needed for sales users to be able to access the output document from within a Transaction.

Learn To:

Create XSL snippets to implement advanced use cases in the Document Designer.
Set up an eSignature DocuSign integration and add signer tags to the Document Designer.
When custom XSL Snippets can be used to accomplish advanced use cases within the Document Designer.
Grasp the strategy behind implementing custom functionality.
Set up integration with eSignature (for customers with DocuSign).
Add signer tags to a Document Designer template to enable the sending and receiving of electronically-signed documents from within CPQ Cloud.

Benefits to You

By taking this course, you'll get a chance to tour the Document Designer editor while building a new document template. Deepen your knowledge of this solution through hands-on exercises that utilize a variety of design components and best practices to implement common use cases. Explore how to dynamically add attribute values, create conditional sections and create looping sections - the main differentiators between the Document Designer and static word-processor produced templates.

Please Note

If you have already taken or you are planning to take Oracle CPQ Cloud Blue Belt Rel 16.1 Ed 1, you should not take this course, as its material is covered in the Blue Belt course. If you have already taken previous versions of Yellow and Blue Belt (which covered the Document Engine and not the Document Designer), then this course is appropriate for you.

Audience
Administrator
Configuration Consultant
Configuration Implementer
Project Manager
System Administrator
Technical Administrator

Required Prerequisites

Oracle CPQ Cloud Yellow Belt Rel 2016 R1 Ed 1

Course Objectives

Create a Loop on a table row to recreate the Line Item Grid in the output

Create a new Document Designer output

Link a Document Designer output to a Commerce Print action

Add Configuration, Commerce, and user attribute values to the Document Designer template

Create Conditions to hide or show components based on logic statements

Add a dynamic signature block to the Document Designer template using an XSL Snippet

Course Topics

Heading Styles
Heading Style Sets
Accessing Heading Style Sets and Heading Styles
Heading Styles Window
Numbering Options
Reset Numbering

XSL Snippets
XSL and the Document Designer
XML Data in CPQ Cloud
Accessing a Transaction's Document XML
Template XSL
Global XSL Snippet
Inline XSL Snippet
XSL Use Case—Adding a Dynamic Signature Block

Translations
Multi-Language Document Designer Options
Creating Multiple Templates for Translations
Creating a Multi-Language Template for Translations
Adding Translations to a Multi-Language Template
Translation View
Use Default
Language-Specific Conditions
Multi-Language Output Tips and Considerations

eSignature Integration
Setting up the Endpoint Integration