



Oracle CPQ

Update 20A

What's New

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REVISION HISTORY

This document will continue to evolve as existing sections change and new information is added. All updates appear in the following table:

Date	Feature	Notes
21 FEB 2020	Transaction Array Support for Commerce Hiding Rules	Updated document. Revised feature content.
21 FEB 2020	Export JET Transaction UI Line Item Grid to .XLSX File Format	Updated document. Revised feature content.
11 FEB 2020		Created initial document.

OVERVIEW

Oracle Configure, Price, and Quote (CPQ) enables companies to streamline the entire opportunity-to-quote-to-order process, including product selection, configuration, pricing, quoting, ordering, and approval workflows. Oracle CPQ provides a flexible, scalable, enterprise-ready solution ideal for companies of all sizes that sell products and services across direct, indirect, and e-commerce sales channels.

This guide outlines the information you need to know about new or improved functionality in Oracle CPQ 20A and describes any tasks you might need to perform for the update. Each section includes a brief description of the feature, the steps you need to take to enable or begin using the feature, any tips or considerations that you should keep in mind, and the resources available to help you.

KEY RESOURCES

Refer to Oracle CPQ Administration Online Help for detailed descriptions and instructions.

In Oracle CPQ 20A, we are introducing new Administrator Videos in our Administration Online Help. These videos provide quick demonstrations for several administration tasks.

SECURITY & NEW FEATURES

We would like to remind you if your system has modified security structures you may need to advise your security administrator of new features you would like to implement.

GIVE US FEEDBACK

We welcome your comments and suggestions to improve the content. Please send us your feedback at cpqcloud_documentation_us_grp@oracle.com.

FEATURE SUMMARY

We continue to add many new features to Oracle Cloud Applications and we now give you the option to take advantage of new functionality at a pace that suits you. The table below offers a quick view of the actions required to enable each of the new features.

Column Definitions:

Report = New or modified, Oracle-delivered, ready to run reports.

UI or Process-Based: Small Scale = These UI or process-based features are typically comprised of minor field, validation, or program changes. Therefore, the potential impact to users is minimal.

UI or Process-Based: Larger Scale* = These UI or process-based features have more complex designs. Therefore, the potential impact to users is higher.

Customer Action Required = You MUST take action before these features can be used by END USERS. These features are delivered disabled and you choose if and when to enable them. For example,

- a) new or expanded BI subject areas need to first be incorporated into reports,
- b) Integration is required to utilize new web services, or
- c) features must be assigned to user roles before they can be accessed.

Feature	Ready for Use by End Users (Feature Delivered Enabled)			Customer Must Take Action before Use by End Users (Feature Delivered Disabled)
	Report	UI or Process-Based: Small Scale	UI or Process-Based: Larger Scale*	Customer Action Required
BML				
BML Compiler Optimization		✓		
Set Attribute Value BML Function		✓		
Support Insert, Delete, Update, and Modify BMQL Functions for Live Data Tables		✓		
Commerce				
Commerce Filter Rule for Line Item Grid Items				✓
Run Commerce Rules in Parallel		✓		
Transaction Array Support for Commerce Hiding Rules				✓
Transaction Opens in New Tab from Commerce Search				✓
Configuration				
Configuration Administrator-Defined Filters				✓
Signed Punch-In Configurable Attributes		✓		

Feature	Ready for Use by End Users (Feature Delivered Enabled) Reports plus Small Scale UI or Process-Based new features will have minimal user impact after an update. Therefore, customer acceptance testing should focus on the Larger Scale UI or Process-Based* new features.			Customer Must Take Action before Use by End Users (Feature Delivered Disabled) Not disruptive as action is required to make these features ready to use. As you selectively choose to leverage, you set your test and roll out timing.
	Report	UI or Process-Based: Small Scale	UI or Process-Based: Larger Scale*	Customer Action Required
Data Tables				
JET Data Table UI		✓		
JET User Interface				
JET Configuration and Transaction UI HTML Help Message		✓		
Enable AJAX for Configuration Rules with Array Attribute Inputs				✓
Export JET Transaction UI Line Item Grid to .XLSX File Format				✓
Default Array Column Width for JET Configuration UI				✓
JET Transaction UI Error Message Enhancements		✓		
Managed Viewed Columns for JET Transaction UI Tables		✓		
Web Services				
Sales User Access to Buy-Side GET Metadata REST APIs				✓

BML

The following BML features and enhancements are available in Oracle CPQ 20A:

- BML Compiler Optimization
- Set Attribute Value BML Function
- Support Insert, Delete, Update, and Modify BMQL Functions for Live Data Tables

BML COMPILER OPTIMIZATION

The Oracle CPQ 20A BML script compiler is enhanced to utilize StringBuilders in the background to optimize string building during the internal processing of BML functions.

STEPS TO ENABLE

You don't need to do anything to enable this enhancement.

TIPS AND CONSIDERATIONS

If you want to disable the BML compiler optimization enhancement, submit a Service Request (SR) on [My Oracle Support](#).

SET ATTRIBUTE VALUE BML FUNCTION

A new BML function, `setattributevalue`, is available to set a Commerce attribute value on a Main document or Sub-document. This function can be used in place of adding to the return string of a Modify function. The `setattributevalue` function is supported for the following:

- Advanced Default (Main document Commerce attributes)
- Advanced Default - Before Formulas (Sub-document Commerce attributes)
- Advanced Default - After Formulas (Sub-document Commerce attributes)
- Advanced Modify - Before Formulas (Main document Commerce Modify actions)
- Advanced Modify - After Formulas (Main document Commerce Modify actions)
- Advanced Modify - Before Formulas (Sub-document Commerce Modify actions)
- Advanced Modify - After Formulas (Sub-document Commerce Modify actions)
- Commerce BML Libraries (Function Category = Others)

IMPORTANT: This function is used to set Commerce attributes only.

BML Syntax:

Main Document Syntax:

```
setattributevalue(mainDocAttrVarName, value)
```

Sub-Document Syntax:

```
setattributevalue(documentNumber, subDocAttrVarName, value)
```


Parameters:

Parameter	Type	Description
mainDocAttrVarName	String	The attribute variable name to set the value on the Main document.
documentNumber	Integer	Unique document number used as an identifier for the Transaction Line Item. This is required when the BML function is used for setting a sub-document value. This parameter can be an Integer or String "integer". For example, both "2" and 2 are valid entries.
subDocAttrVarName	String	The attribute variable name to set the value on the Sub-document.
value	String Float Integer Currency Date Boolean	The value you want set for the specified attribute. The type of value must match the type of the Commerce attribute. Array sets are represented by JSON array reference IDs which are created by the <code>jsonarrayrefid</code> function. Date attributes can be either BML Date objects or Text values. Currency and Float attributes can be both Float and Integer values.

Example:

```
//Set the value of an array set containing a text field, and a single row,
named arraySet.

newRow = json();
jsonput(newRow, "textField", "example");
jsonarrayappend(arraySet, newRow);
setattributevalue(1, "arraySet", jsonarrayrefid(arraySet));
```

STEPS TO ENABLE

You don't need to do anything to enable this feature.

TIPS AND CONSIDERATIONS

- The `setattributevalue` call is supported within the BML Library only if it is referenced from an Advanced Modify or Advanced Default function.
- If there is a conflict between the `setattributevalue` and the return string, the return string overwrites the `setattributevalue` response.
- Updated attribute values set using the `setattributevalue` function are available immediately when referencing that attribute in the current BML execution context.

KEY RESOURCES

Refer to the Oracle CPQ Administration Online Help for details about using the BML Function Editor.

Currently, modifying Live Data Tables is accomplished using UI, Web Services, or Bulk Upload. In 20A, BMQL functions are supported to insert, delete, update, and modify Live Data Tables. When storing Transaction-related data within a Live Data Table is required as part of a business process, using BMQL functions to update Live Data Tables is recommended over using Web Services. Since the action is performed on a Live Data Table, there is no need to deploy the table after modification is complete.

You can access the BMQL functions from the BML Function Wizard. Refer to the Oracle CPQ Administration Online Help for more information.

Insert BMQL Function

The INSERT statement is used to add a new record into a Live Data Table.

Syntax:

```
RecordSet bmql(String sqlQuery [, String Dictionary contextOverride, String Dictionary fieldMap])
```

Example:

```
results = bmql("insert into table1 (column1, column2) values ('value1',
11),('value2', 22)");
  for result in results {
    insert_count_integer = get(result, "records_inserted");
    records_error_string = get(results, "records_error");
  }
```

For INSERT statements, `results` is a record set with one integer entry that indicates the number of rows added. This is usually the same as the number of records in the VALUES part of the BMQL statement, but sometimes a row may fail due to duplicate natural key entries. When this occurs, a `records_error` entry is added, showing the first record that blocks the insertion as a JSON string.

The INTO keyword is followed by the name of the Live Data Table and then a list of columns in parentheses and without quotes. These are the columns which the values statement will populate.

The VALUES keyword prefixes a list of records to be inserted. Each record is bracketed by parentheses and contains a list of values to be inserted. The values must be given in the same order as the columns. String values must be in single quotes.

Delete BMQL Function

The DELETE statement is used to delete existing rows or columns into a Live Data Table.

Syntax:

```
RecordSet bmql(String sqlQuery [, String Dictionary contextOverride, String Dictionary fieldMap])
```

Example:

```
results = bmql("delete from table1 where column1 = 'value2'");
    for result in results {
        deletion_count_integer = get(result, "records_deleted");
    }
```

For DELETE statements, `results` is a records set with one integer entry that indicates the number of rows deleted.

The FROM keyword specifies the object to retrieve the data from.

IMPORTANT: Executing a DELETE statement without a WHERE clause will clear all of the data in the Live Data Table.

Update BMQL Function

The UPDATE statement is used to update an existing record in a Live Data Table.

Syntax:

```
RecordSet bmql(String sqlQuery [, String Dictionary contextOverride, String Dictionary fieldMap])
```

Example:

```
results = bmql("update table1 set column1 = 'new_value1', column2 = 'new_value2'
where column1 = 'old_value1'");
    for result in results {
        update_count_integer = get(result, "records_updated");
        records_error_string = get(result, "records_error");
    }
```

For UPDATE statements, `results` is a record set with one integer entry showing the number of rows modified. A `records_error` entry is added when the query is valid but the Live Data Table state blocks the update.

The SET keyword is used to change field values in the Live Data Table. The format is the name of the column followed by the "=" operator and then the value to be set. For example, `string1 = 'ABC-112A'`.

IMPORTANT: Executing a UPDATE statement without a WHERE clause will update all of the data in the Live Data Table.

Modify BMQL Function

The MODIFY statement is used to modify an existing record or create a new record in a Live Data Table.

Syntax:

```
RecordSet bmql(String sqlQuery [, String Dictionary contextOverride, String Dictionary fieldMap])
```

Example:

```
results = bmql("modify table1 set column1 = 'new_value1', column2 = 'new_value2'
where column1 = 'old_value1'");

for result in results {
    insert_count_integer = get(result, "records_inserted");
    update_count_integer = get(result, "records_updated");
    records_error_string = get(result, "records_error");
}
```

For MODIFY statements, `results` is a record set with two integer entries, one with the number of rows modified and one with the number of rows added. A `records_error` entry is added when the query is valid but the Live Data Table state blocks the update.

The SET keyword is used to change field values in the Live Data Table. The format is the name of the column followed by the "=" operator and then the value to be set. For example, `string1 = 'ABC-112A'`.

IMPORTANT: Executing a MODIFY statement without a WHERE clause will modify all of the data in the Live Data Table.

Dynamic Variables

In Oracle CPQ 20A, the Live Data Table INSERT, DELETE, MODIFY, and UPDATE BMQL statements can be used in dynamic BMQL scripts. BMQL allows the use of dynamic variables for column names, Data Table names, and WHERE clauses. Using direct variable substitution, called *dynamic variables*, makes it simpler to write BML queries that change based on user input, without having to write a unique clause in the query for every possible permutation of inputs.

Variables in the SELECT, FROM, VALUES, and WHERE clause are able to be used with `$var` syntax. Alternatively the entire WHERE clause can be a string variable, as can the list of columns to be updated in an INTO statement. If there are variables within the WHERE clause variable, you must define these variables in a string Dictionary and pass them as a third parameter. In this case you must also define a second parameter.

The following example includes dynamic variables for Live Data Table insert, delete, modify, and update.

Example:

```
bmqlReturn = "nothing";
select = "string1,int1";
from = "uploadXMLtable";
lang = dict("string");
fields = dict("string");
x_var = "6.08";
y_var = "2.03";
a_var = 2;
b_var = 1;
put(fields, "$field1", x_var);
set1 = "string1 = 'Platypus'";
set2 = "string1 = 'Platypodes'";
where = "float1 = $field1";
where_delete = "string1 = $field1";
results = bmql("insert into $from ($select) values ($x_var, $a_var),($y_var, $b_var)");
results = bmql("delete from $from where $where_delete", lang, fields);
results = bmql("update $from set $set1 where $where", lang, fields);
results = bmql("modify $from set $set2 where $where", lang, fields);
results = bmql("select $select from $from where $where", lang, fields);
for result in results {
    bmqlReturn = get(result, "string1");
}
return bmqlReturn;
```

STEPS TO ENABLE

You don't need to do anything to enable this feature.

TIPS AND CONSIDERATIONS

- The INSERT, DELETE, UPDATE, and MODIFY BMQL functions only work with Live Data Tables.
- BMQL is case-sensitive. Be aware of this when selecting your rows, columns, fields, and values.

COMMERCE

The following Commerce features and enhancements are available in Oracle CPQ 20A:

- Commerce Filter Rule for Line Item Grid Items
- Run Commerce Rules in Parallel
- Transaction Array Support for Commerce Hiding Rules
- Transaction Opens in a New Tab from Commerce Search

COMMERCE FILTER RULE FOR LINE ITEM GRID ITEMS

Oracle CPQ 20A introduces a new Commerce filter-type rule to exclude irrelevant Line Item Grid items. Administrators can define Commerce Filter rules that use Commerce attributes for simple or Advanced BML conditions to filter out items that are not relevant to the current user.

Administrators can add a sub-document Filter rule to exclude irrelevant items for sales users. For example, the Line Item Grid in the Transaction UI shows all the BOM items as a result of the BOM Mapping Rules. A subset of the BOM items in this list, though useful for downstream fulfillment systems, are considered internal to the customer and not relevant for the sales users.

The screenshot shows the 'Line Item Details' interface. At the top, there is a toolbar with icons for View, Filter, Print, Refresh, Settings, Edit, Copy, Paste, and Freeze, along with an 'Add' button. Below the toolbar is a table with the following columns: #, Item #, Item, Order Qty, Buy Price, and Type. The table contains 10 rows of data. A red rectangular box highlights the rows for items 3, 7, and 8, which are all marked as 'Internal' in the Type column.

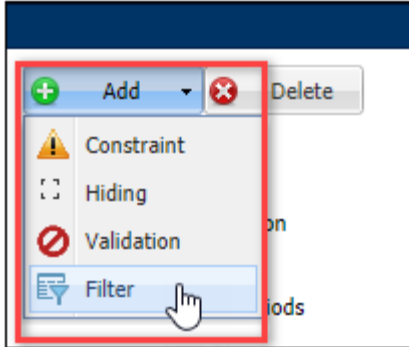
#	Item #	Item	Order Qty	Buy Price	Type
1		Ultra Power Server	1	\$0.00	
3	CM2151010	Packaging, 3 RU	1	\$0.00	Internal
7	CM2151081	Compliance Sheets	1	\$0.00	Internal
8	CM2151082	Ultra Server X7-4 Technical Documentation	1	\$0.00	Internal
2	CM2151001	Ultra Server X7-4: 3 Rack Unit	1	\$6,888.00	
4	CM2151020	8-core 2.4 GHz Processor	1	\$5,350.00	
5	CM2151030	8 GB RAM	4	\$137.00	
6	CM2151040	300 GB HDD	1	\$345.00	
9	CM2151101	Power Cord, Length 2M	1	\$9.00	
10	CM2151120	Linux	1	\$49.95	

Page 1 of 2 (1-10 of 12 items) | < 1 2 >

STEPS TO ENABLE

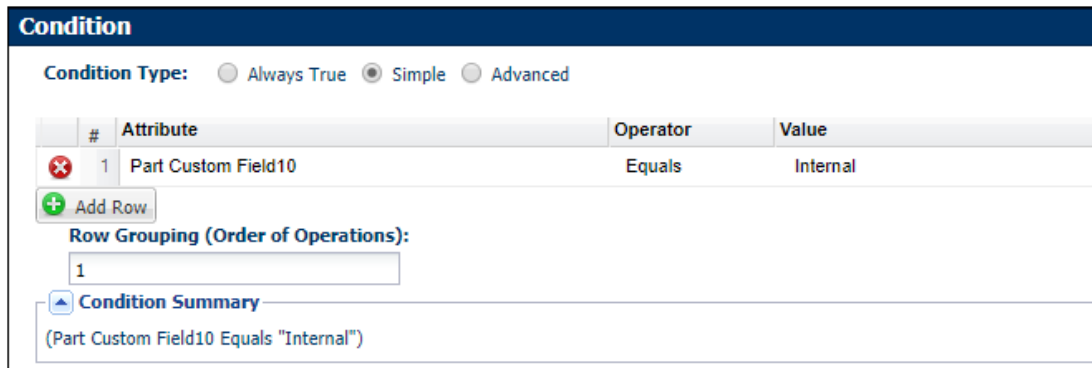
Complete the following steps to define a Commerce Filter rule for the transaction line items.

1. Navigate to the **Rule Editor** page for the applicable Commerce sub-document.
Admin > Commerce and Documents > Process Definition > Documents > Rules
2. Select **Filter** from the **Add** drop-down menu.



3. Enter the rule **Properties**.
 - a. **Name** - Enter the name of the rule in this section. *This is a required field.*
 - b. **Variable Name** - The Variable Name field populates automatically. Variable names can only contain alpha-numeric characters and underscores. The entry can be changed before saving, but after saving the value is read-only. *This is a required field.*
 - c. **Description** - Enter a description, if desired.
 - d. **Status** - Determine the status of the rule:
 - **Active** - The rule is fired when the condition is met.
 - **Inactive** - The rule is not fired even if the condition is met. Inactive rules are displayed in italics in the rules list in the left panel.
4. Define the rule Condition.
 - a. Select the Condition Type.
 - b. Select an attribute from the drop-down menu.
 - c. Select an Operator and enter the Value to filter.

For example, the following filter will hide all "Internal" type parts from the Line Item Grid.

A screenshot of a 'Condition' configuration page. At the top, there are three radio buttons for 'Condition Type': 'Always True', 'Simple' (which is selected), and 'Advanced'. Below this is a table with columns '#', 'Attribute', 'Operator', and 'Value'. The table has one row with '# 1', 'Attribute Part Custom Field10', 'Operator Equals', and 'Value Internal'. There is a red 'X' icon in a circle next to the row number. Below the table is an 'Add Row' button. Underneath is a section titled 'Row Grouping (Order of Operations):' with a text input field containing the number '1'. At the bottom, there is a 'Condition Summary' section with a blue arrow icon and the text '(Part Custom Field10 Equals "Internal")'.

5. Click **Save**.

After the Filter rule is saved and deployed, all "Internal" type parts are excluded from the Line item Grid.

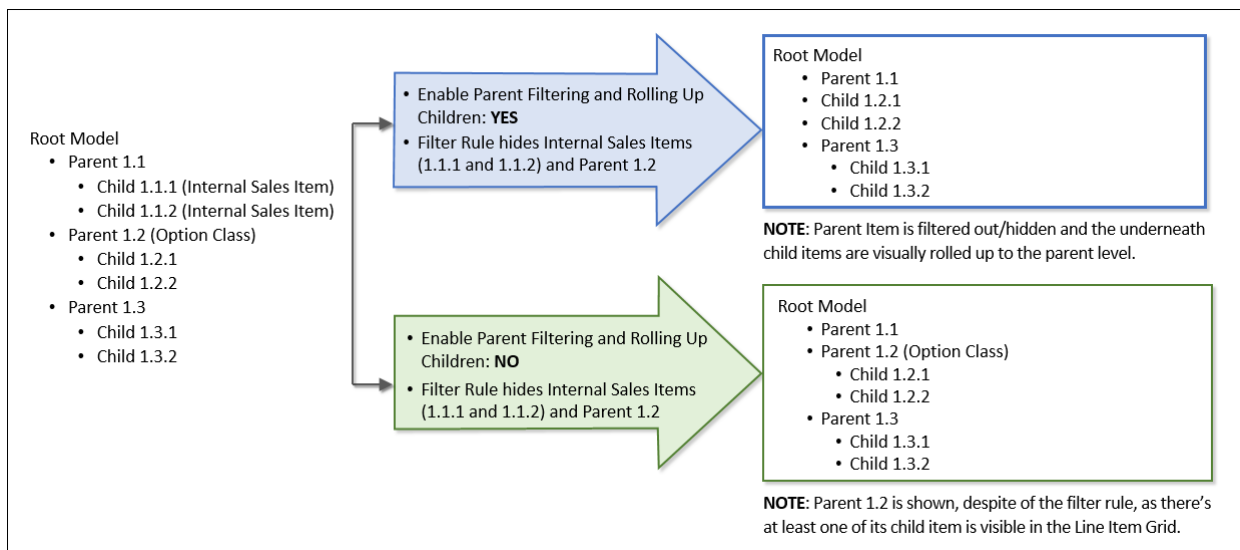
Line Item Details					
#	Item #	Item	Order Qty	Buy Price	Type
1		Ultra Power Server	1	\$0.00	
2	CM2151001	Ultra Server X7-4: 3 Rack Unit	1	\$6,888.00	
4	CM2151020	8-core 2.4 GHz Processor	1	\$5,350.00	
5	CM2151030	8 GB RAM	4	\$137.00	
6	CM2151040	300 GB HDD	1	\$345.00	
9	CM2151101	Power Cord, Length 2M	1	\$9.00	
10	CM2151120	Linux	1	\$49.95	
11	WR11519	Vision Gold Service Plan	1	\$149.95	
12	WR11513	Service-Level Agreement	1	\$225.00	

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Enable Parent Filtering and Rolling Up Children

Oracle CPQ 20A adds a new Commerce option to promote child items up a level when their parent item is hidden by a Commerce Filter rule. If the "Filter Rule – Enable parent filtering and rolling up children" option is set to "Yes" child items will be promoted when their parent is hidden. If this option is set to "No" the child items will not be promoted when their parent is hidden. The default setting is "No".

The following diagram provides an example of the Commerce Filter Rule setting.



Example of Commerce Filter Rule Setting Behavior

Complete the following steps to enable parent filtering and rolling up children.

1. Navigate to the Commerce Options page.
Admin Home > Commerce and Documents > Commerce Settings
2. Set the **Filter Rule – Enable parent filtering and rolling up children** option to **Yes**.

The screenshot shows the 'Commerce Options' configuration page. The title is 'Commerce Options' and the subtitle is 'Options - Commerce'. The page contains several configuration items, each with a 'Yes' or 'No' radio button. The 'Filter Rule - Enable parent filtering and rolling up children' option is highlighted with a red box and has the 'Yes' radio button selected. Other options include 'Number of Milliseconds to Wait Before Showing the Loading Dialog for Ajax Rules' (1000), 'Allow Commerce Processes and Invocations to be Deployed and Undeployed' (Yes), 'Allow Commerce Processes to be Cloned and Migrated' (Yes), 'Allow the Transaction ID to be included in the Commerce Search' (Yes), 'Hide Commerce Invocation Buttons on Add From Catalog' (Yes), 'Disable Transaction ID Button on Add From Catalog' (No), 'Accounts Lookup Library Function' (dropdown), 'Enable Subscription Ordering for Simple Products' (No), and 'Enable HTML Approval Email' (Yes). At the bottom right, there is a 'Back to Top' link and three buttons: 'Apply', 'Update', and 'Back'.

3. Click **Update** to save your changes and return to the previous page.

TIPS AND CONSIDERATIONS

To prevent inaccessible line items administrators should avoid using modifiable attributes in filter rule conditions that can directly affect line item visibility.

RUN COMMERCE RULES IN PARALLEL

The internal handling of Commerce condition rules is enhanced to include more systematic parallel processing of the rules conditions in order to improve end user response time.

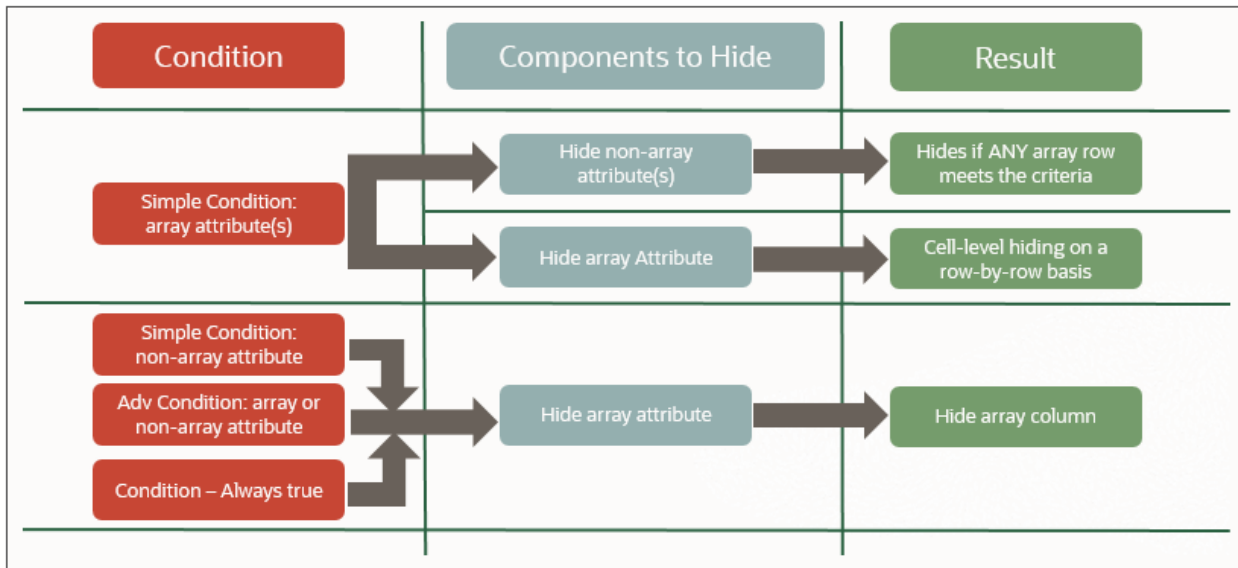
STEPS TO ENABLE

You don't need to do anything to enable this feature.

TIPS AND CONSIDERATIONS

If you want to disable this feature, submit a Service Request (SR) on [My Oracle Support](#).

Beginning in Oracle CPQ 20A, administrators can use transaction array set attributes in the Commerce Hiding Rules. Array attributes can be used in both simple and advanced modes for the condition and for the components-to-hide sections of the hiding rules. Transaction array hiding behaviors are similar to Configuration array set behaviors.



Transaction array attribute hiding behaviors are as follows:

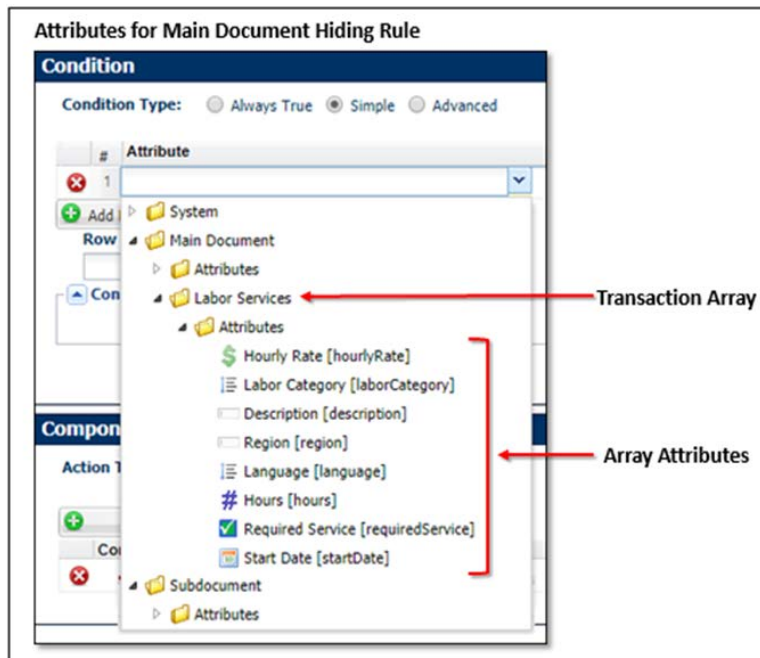
- If an array attribute is used as a simple condition and the components to hide only uses document attributes, the result is that the document attributes are hidden if any array row meets the condition.
- If an array attribute is used as a simple condition and the components to hide also use array attributes, the result is cell-level hiding as determined on a row-by-row basis.
- If a simple condition exists without referencing an array attribute and the components to hide uses array attributes, the result is that the entire array column is hidden.
- If an advanced condition is used either with or without array attributes and the components to hide uses array attributes, the result is that the entire array column is hidden.
- If a condition is "Always True" and the components to hide uses array attributes, the result is that the entire array column is hidden.

STEPS TO ENABLE

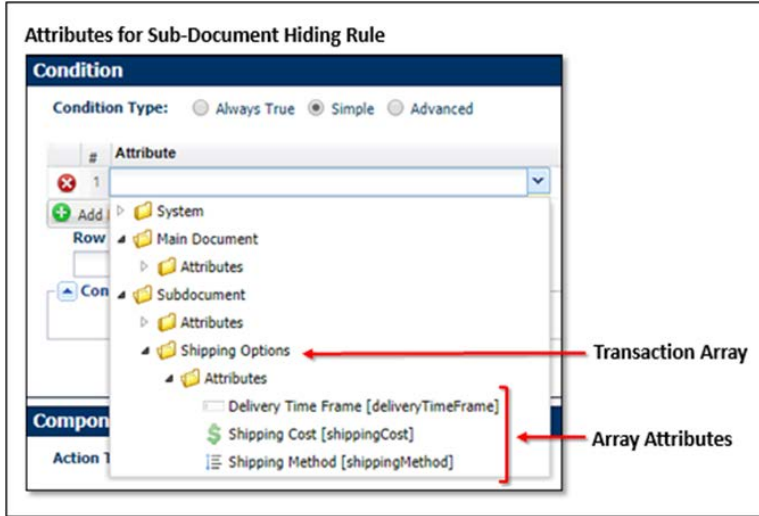
Complete the following steps to use a transaction array set attribute in a Commerce Hiding rule.

1. Navigate to the Rules List page.
Admin > Commerce and Documents > Process Definition > Documents > Rules
2. Select **Hiding** from the **Add** drop-down to create a new Hiding rule.
3. Enter the rule **Properties**.
 - a. **Name** - Enter the name of the rule in this section. *This is a required field.*
 - b. **Variable Name** - The Variable Name field populates automatically. Variable names can only contain alpha-numeric characters and underscores. The entry can be changed before saving, but after saving the value is read-only. *This is a required field.*
 - c. **Description** - Enter a description, if desired.
 - d. **Status** - Determine the status of the rule:
 - **Active** - The rule is fired when the condition is met.
 - **Inactive** - The rule is not fired even if the condition is met. Inactive rules are displayed in italics in the rules list in the left panel.
4. Define the rule Condition.
 - a. Select the Condition Type.
 - b. Select an attribute from the drop-down menu.
 - c. Select an Operator and enter the Value to filter.

When you are creating a main document Hiding rule, you can select main document transaction array attributes for rule conditions.

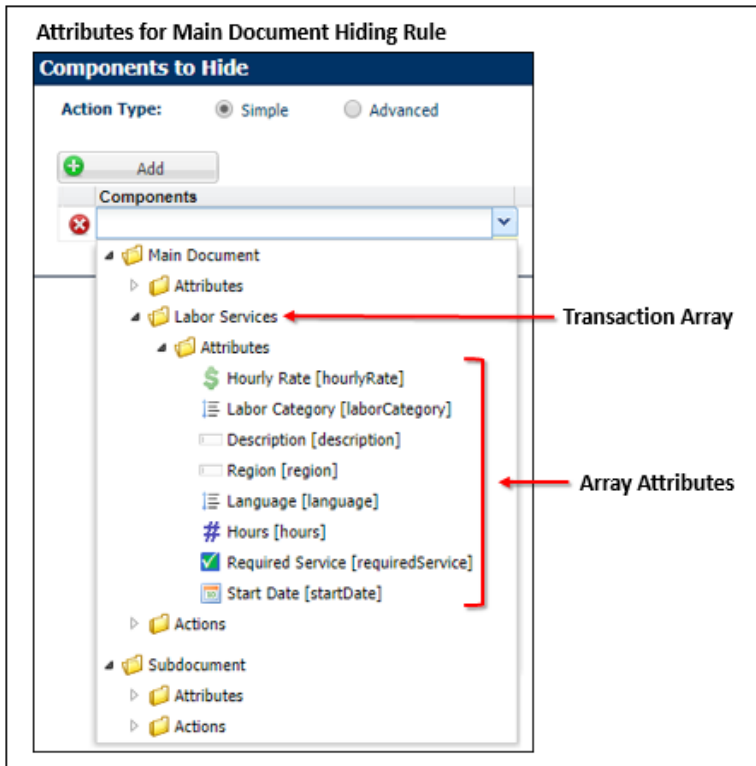


When you are creating a sub-document Hiding rule, you can select sub-document transaction array attributes for rule conditions.

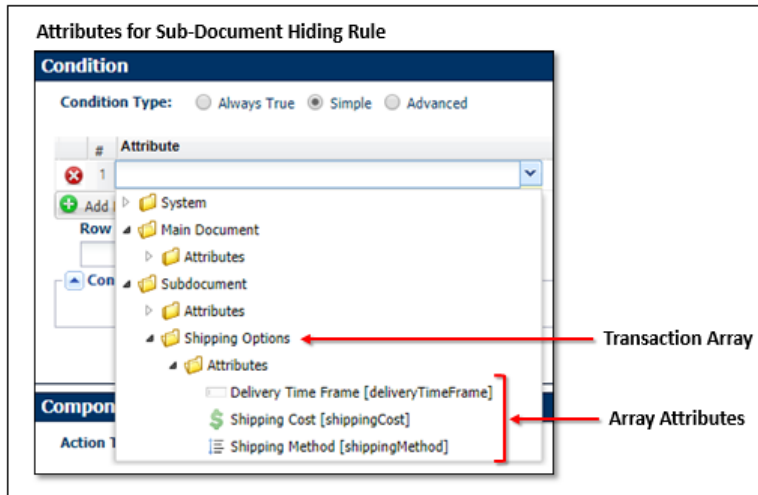


5. Define the rule Condition.
 - a. Select the Condition Type.
 - b. Select an attribute from the drop-down menu.

When you are creating a main document Hiding rule, you can hide main document transaction array attributes.



When you are creating a sub-document Hiding rule, you can hide sub-document transaction array attributes.



6. Click **Save**.

TIPS AND CONSIDERATIONS

- If Hiding rules are used to hide a transaction array, administrators should designate an Array Controller Attribute for the transaction array and set the minimum value to one or more.
- One or multiple transaction array attributes within the same transaction array set can be used in a hiding rule condition. However, different transaction array sets cannot be referred to in that same condition or component to hide. When a transaction array attribute does not meet the supported transaction array hiding rule conditions, the attribute is not available for selection within the UI.
- When a transaction array attribute is referenced in a hiding rule, a related rules link is displayed on the Attribute Array Set Editor page in the Array Attribute List - Related Rules column. Administrators can view the List of Related Rules and access associated hiding rules.
- In advanced BML, only the transaction array set is available for selection. Administrators can access the transaction array attribute from BML functions. Refer to Commerce > Commerce Attributes & Arrays > Array Sets > BML Support article within the Oracle CPQ Administration Online Help for more information.
- When a transaction array attribute is used in a simple condition, the array attribute will trigger auto update. However, if an array set is used in an advanced BML condition, the administrator must explicitly mark the array attributes that are required to trigger auto update within the Array Attribute Administration page.
- When the State object is requested in Commerce interact and action REST APIs, the response will reflect the hidden state of transaction array attributes when a hiding rule executes.
- Administrators can migrate Commerce hiding rules that affect transaction arrays as granular items or as part of the migration for an entire Commerce process. The Migration Center reflects changes made to hiding rules and allows administrators to migrate the changes between sites.

TRANSACTION OPENS IN NEW TAB FROM COMMERCE SEARCH

Navigation to a Transaction from Commerce Search is improved. A new General Site Option setting, **Open transactions in a new tab from Commerce Search**, is introduced in 20A.

This setting determines the behavior for opening Transactions from the search page, as follows:

- When set to **No** (default) the legacy behavior is retained and the Transaction opens in the existing parent window.
- When set to **Yes**, the Transaction opens in a new tab and focus moves to the new tab. Opening multiple Transactions from the Commerce Search page will result in each Transaction opening in a new tab.

STEPS TO ENABLE

To open Transactions in a new tab from Commerce Search, complete the following steps:

1. Navigate to the General Site Options page.

Admin Home > General > General Site Options

2. Set the **Open transactions in a new tab from Commerce Search** option to **Yes**.

The screenshot shows the 'Options - General' configuration page. The setting 'Open transactions in a new tab from Commerce Search' is highlighted with a red box, and the 'Yes' radio button is selected. Other settings include 'Show the Oracle Logo at the bottom of each page', 'Occupy entire window when the site is inside a frame', 'Show Parent Parts on Part Detail Page', 'Display Variable Name in ...', 'Sort by default in Migration Center', 'Options - Login', 'Options - Password', and 'Feature Settings'. The 'Apply', 'Update', and 'Back' buttons are visible at the bottom right.

3. Click **Update** to save your changes and return to the previous page.

TIPS AND CONSIDERATIONS

Note that in the case of iFramed CRM integration, opening a new tab occupies the full window and you will lose the parent CRM window.

CONFIGURATION

The following Configuration enhancements are available in Oracle CPQ 20A:

- Configuration Administrator-Defined Filters
- Signed Punch-In Configurable Attributes

CONFIGURATION ADMINISTRATOR-DEFINED FILTERS

Oracle CPQ 20A introduces administrator defined display filters for the Bill of Materials and Recommended Item lists. When enabled, administrators can use parts and product attributes to define filter conditions to display only relevant items.

When the Configuration Filter is enabled, administrators can add a filter to the Recommended Items page template to exclude irrelevant items for sales users. For example, the Bill of Materials list in Configurator UI shows all the BOM items as a result of the BOM Mapping Rules. A subset of the BOM items in this list, though useful for downstream fulfillment systems, are considered internal to the customer and not relevant for the sales users.

Price	Part Number	Description	Quantity	Type
Not Defined	Ultra Power Server		1	
\$6,888.00	CM2151001	Ultra Server X7-4: 3 Rack Unit	1	
\$5,350.00	CM2151020	8-core 2.4 GHz Processor	1	
\$137.00	CM2151030	8 GB RAM	4	
\$345.00	CM2151040	300 GB HDD	1	
\$9.00	CM2151101	Power Cord, Length 2M	1	
\$49.95	CM2151120	Linux	1	
Not Defined	CM2151010	Packaging, 3 RU	1	Internal
Not Defined	CM2151081	Compliance Sheets	1	Internal
Not Defined	CM2151082	Ultra Server X7-4 Technical Documentation	1	Internal

STEPS TO ENABLE

Complete the following steps to define a display filter for the Bill of Materials and Recommended Item lists.

1. Navigate to the Admin page.
2. Select **Page Templates** in the Styles and Templates section.
3. Select **Templates for the Recommended Items Page**.
4. Scroll to the bottom of the page and click **Add Row**.
5. Define the filter criteria for the items to exclude from the display list.

For example, "Part: Type = Internal" will hide all "Internal" type parts from the Bill of Materials and Recommended Item lists.

Templates for Recommended Items

Select Template for Display

Production	Test	Available Templates	Description
<input type="radio"/>	<input type="radio"/>	Use Legacy Template	Choose this template if you want to display Recommended Item name, description, price, quantity, and comments to all users
<input checked="" type="radio"/>	<input checked="" type="radio"/>	Use Custom Template	Choose this template to customize your display. All available columns are automatically displayed unless the administrator chooses to hide column. Hide a column from all users by selecting the appropriate check box in the Always Hide Column. Hide a column depending on user type or groups by launching the permissions popup. You can also specify a new label for a displayed column

Edit Custom Template

Order	Model Column Names	Label	Always Hide	Hide by Permissions
1	Model Name	<input type="text"/>	<input type="checkbox"/>	
2	Comment	<input type="text"/>	<input checked="" type="checkbox"/>	
25	Overage Charges	<input type="text"/>	<input type="checkbox"/>	
26	OraPriceType	<input type="text"/>	<input checked="" type="checkbox"/>	
27	Subscription Type	<input type="text"/>	<input checked="" type="checkbox"/>	

Advanced Config Row Filters (AND All)

#	Query Attribute	Operator	Specified Value
1	Part: Type	=	Internal

6. Click **Save**.

After the Advanced Configuration Row Filters are defined and the Recommended Items page template is saved, all "Internal" type parts are excluded from the Bill of Materials and Recommended Item lists.

Bill of Materials

View

Price	Part Number	Description	Quantity	Type
Not Defined	Ultra Power Server		1	
\$6,888.00	CM2151001	Ultra Server X7-4: 3 Rack Unit	1	
\$5,350.00	CM2151020	8-core 2.4 GHz Processor	1	
\$137.00	CM2151030	8 GB RAM	4	
\$345.00	CM2151040	300 GB HDD	1	
\$9.00	CM2151101	Power Cord, Length 2M	1	
\$49.95	CM2151120	Linux	1	

SIGNED PUNCH-IN CONFIGURABLE ATTRIBUTES

In Oracle CPQ 19D, signed punch-in configurable attributes were introduced for use in the CPQ Pricing Engine. This provided secure configurable attributes for punch-in whose values cannot be changed. An example pricing scenario is wanting to determine a customer's pricing level based on the value of a configurable attribute for Account ID. In this case, you would want the Account ID attribute value to be secure so it cannot be manipulated during the punch-in to obtain a better pricing level.

In 20A, the signed punch-in configurable attribute values are available in ConfigXML and the Pipeline Viewer. This allows access to the signed punch-in configurable attributes values via BML to include them in the punch-in payload response.

STEPS TO ENABLE

You don't need to do anything to enable this feature.

DATA TABLES

The following Data Table feature is available in Oracle CPQ 20A.

JET DATA TABLE UI

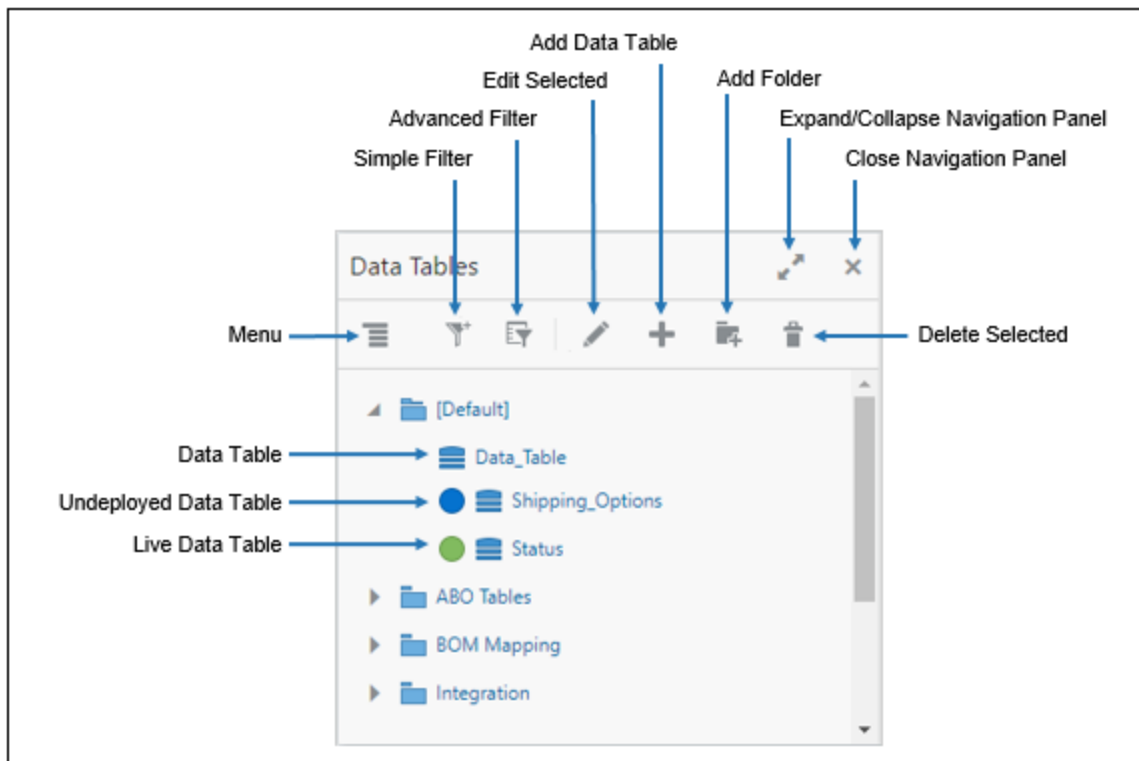
Oracle CPQ 20A updates the Data Table administration UI to JET to provide a better administration experience and a foundation to build additional Data Table functionality.

The following functionality is available in Oracle CPQ 20A.

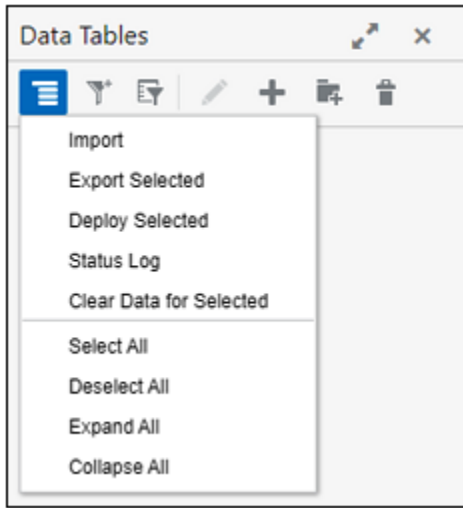
Data Table Side Navigation Panel

The Data Table side navigation panel displays folders and tables in a hierarchical structure. The navigation panel toolbar provides additional menu items, simple and advanced filtering, and action icons for folder and table maintenance functions. The JET data table UI utilizes the full browser page and administrators can close the side navigation panel to allow a larger table editing space. Status icons displayed next to data tables indicate live and undeployed data tables.

- Data tables that have not been deployed are preceded by a blue status icon.
- Live data tables, which immediately reflect saved changes without deploying, are preceded by a green status icon.

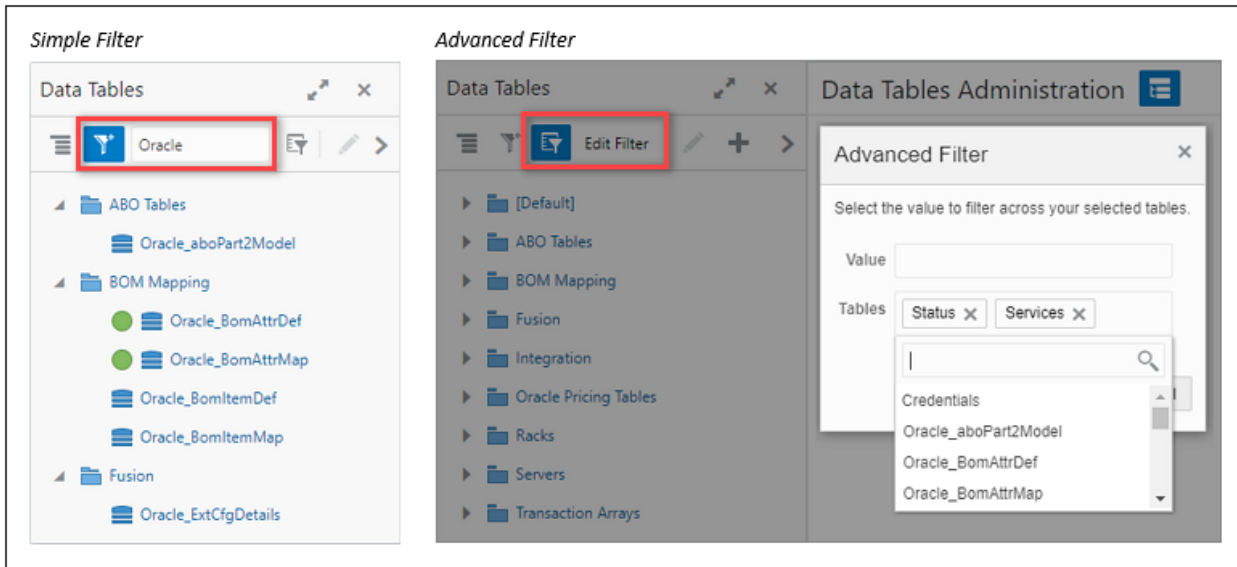


The drop-down menu provides access to import data tables, select/deselect all tables, expand/collapse all tables, and see the Status Log. The export, deploy, and clear data options are available when data tables are selected.

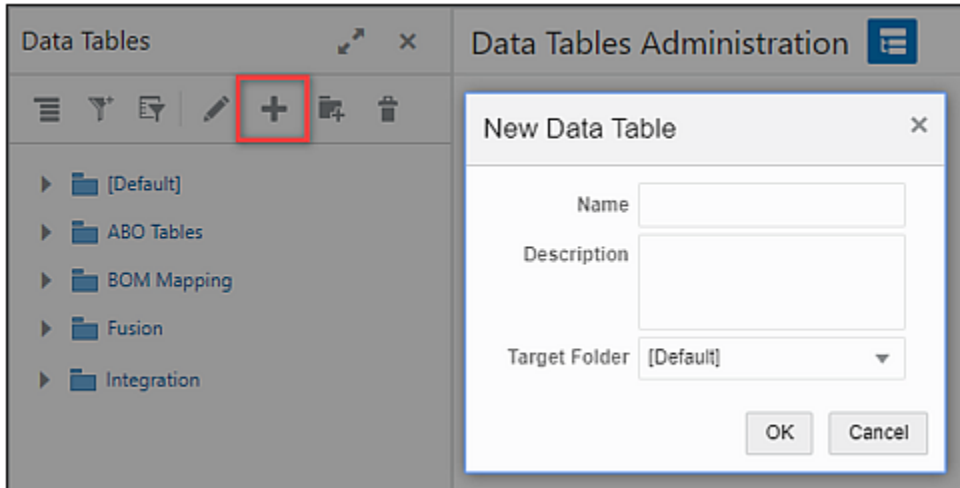


IMPORTANT: You must use the drop-down menu to perform export, deploy, or clear data actions for multiple tables. When you select multiple tables and perform an action from the right-click menu, the operation will only be performed on the single table highlighted with dotted lines.

The simple filter searches the data table names and filters the list of tables using the provided text. The advanced filter, which behaves the same as the Legacy filter, searches the contents of the specified tables and filters the list of tables. If tables are not specified in the Advanced Filter, all data tables are searched. After an Advanced Filter is applied, click "Edit Filter" to modify the search criteria.

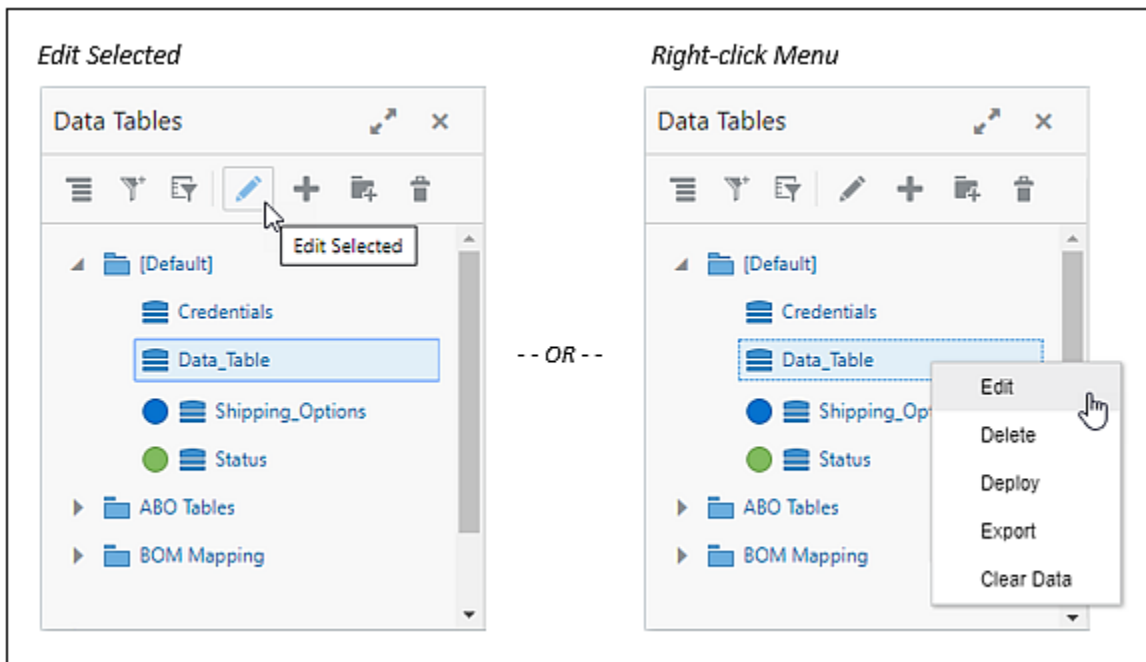


To add a new data table click the "Add Data Table" icon, and then provide the name, description, and select the target folder.



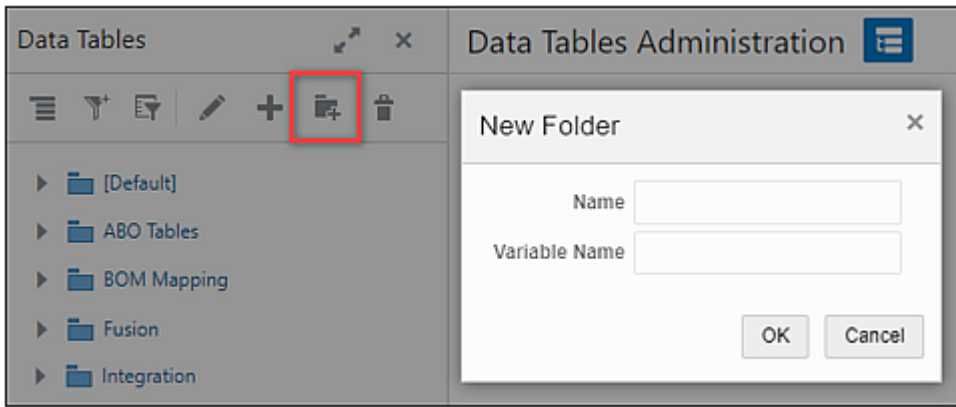
Administrators can use either of the following methods to open a data table:

- Select the data table and then click the "Edit" icon, or
- Right-click on the data table and then select "Edit" from the pop-up menu.



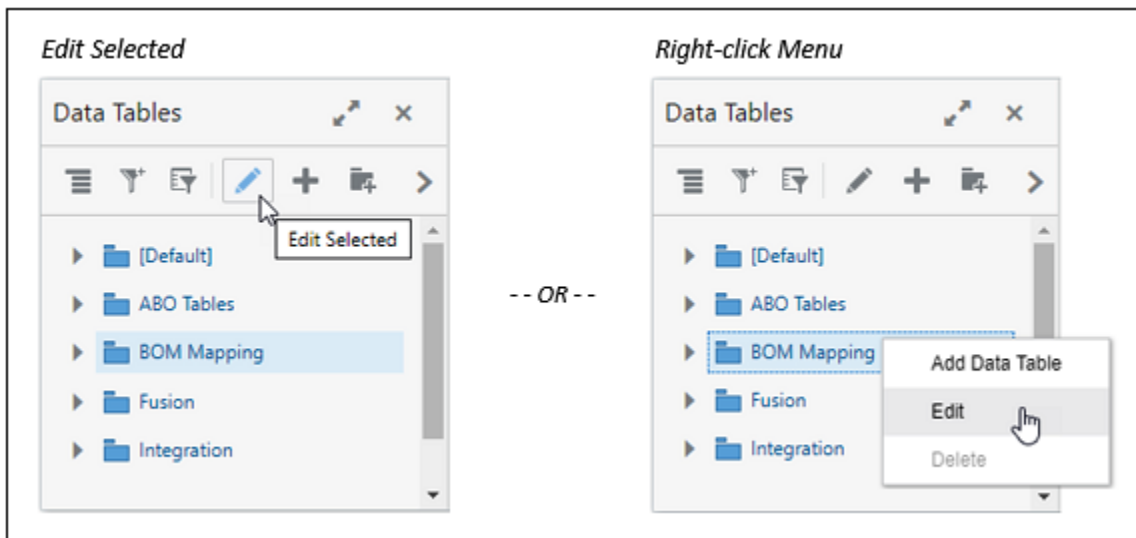
IMPORTANT: The JET UI does not support the double-click action to open a data table.

To add a new folder click the "Add Folder" icon, and then provide the name and variable name.



Administrators can use either of the following methods to edit a data table folder:

- Select the data table folder and then click the "Edit" icon, or
- Right-click on the data table folder and the select "Edit" from the pop-up menu.



IMPORTANT: The folder name is the only property that can be modified.

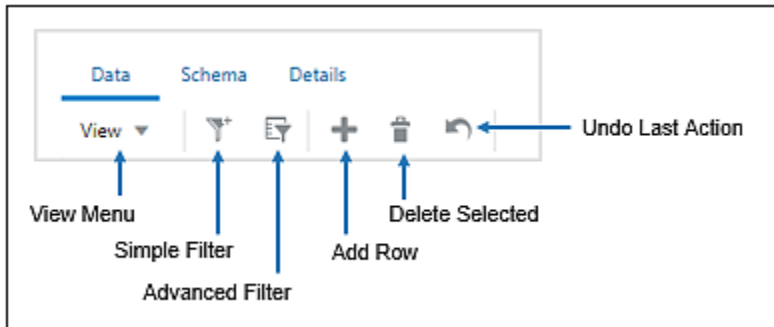
Data Table Data Tab

The Data tab displays the data content of the table that is currently being edited. The Data tab is the default tab, as it is in Legacy. Administrators can view and modify the table data on the Data tab. The JET UI provides several usability enhancements for data tables:

- The navigation panel can be collapsed to provide a larger viewing area for the data table.
- Administrators can sort by columns by clicking on the column header
- Column resize allows users to enter a precise column width.

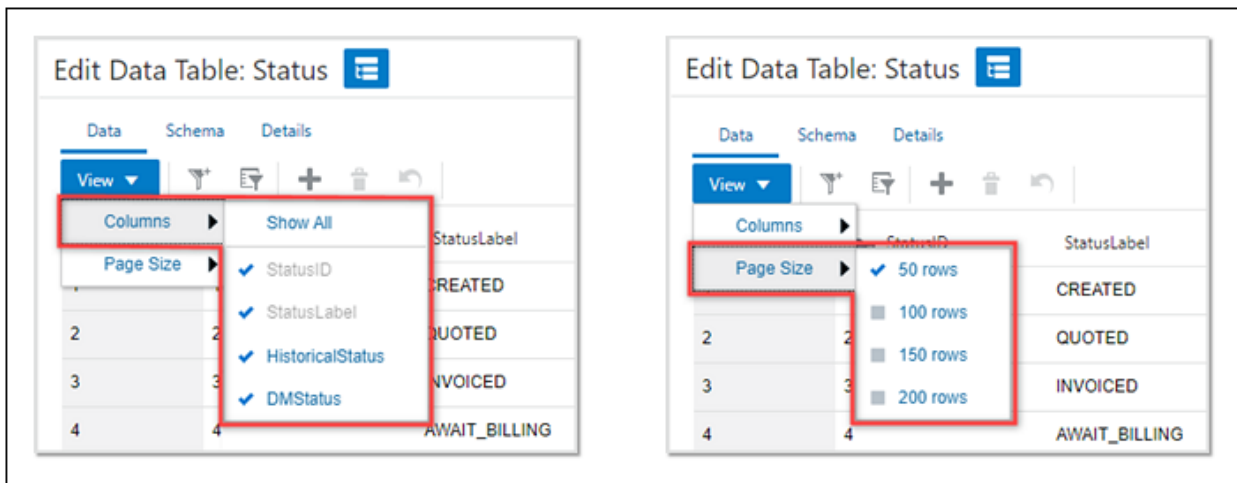
Table Toolbar

The table toolbar provides quick access to view options, filtering, add, delete, and undo actions. The simple and advanced filters in combination with the column and pagination view options improve the user experience especially for data tables containing a large number of columns and/or lines. Additionally, the undo icon now allows administrators to undo all unsaved changes for the selected row.



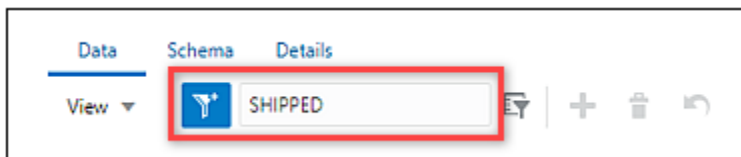
View Menu


The View menu provides options to show/hide columns and set the number of rows displayed per page.



Simple Filter

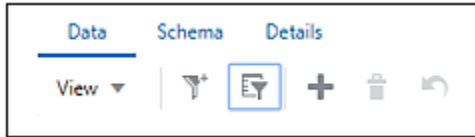
To use the simple filter click on table toolbar Simple Filter icon, type the desired keyword or phrase, and then press <Enter> or <Return>.



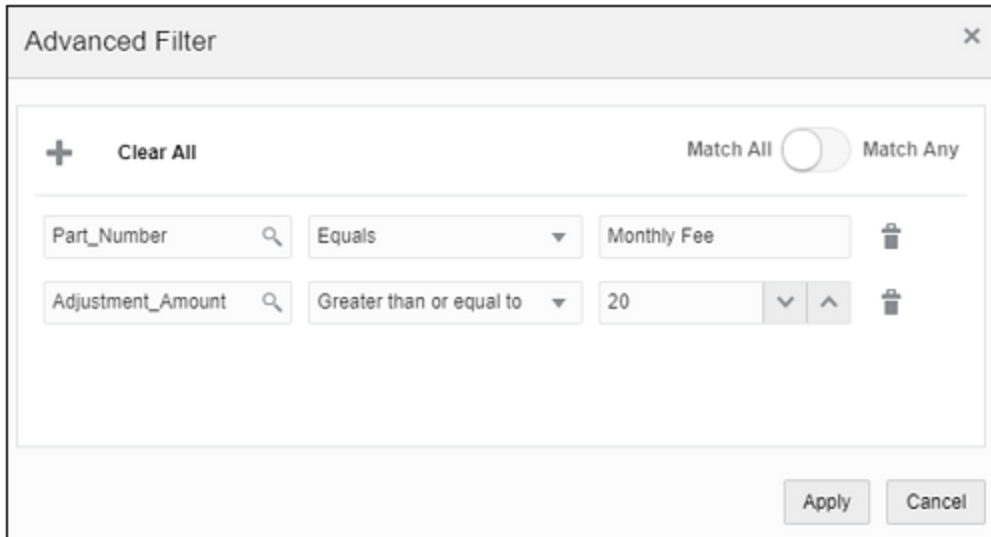
If the keyword is present in any column, the resulting lines are returned. To deactivate the filter, click on the Simple Filter icon. 

Advanced Filters

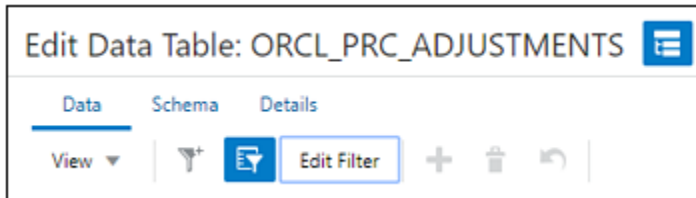
To use the advanced filter click on the table toolbar Advanced Filter icon.



The Advanced Filter dialog opens. Define the filter criteria. In the first column, select the desired column names. In the second column, select the applicable operator. In the third column, define the search criteria. Select "Match Any" or "Match All". Click Apply to filter results.

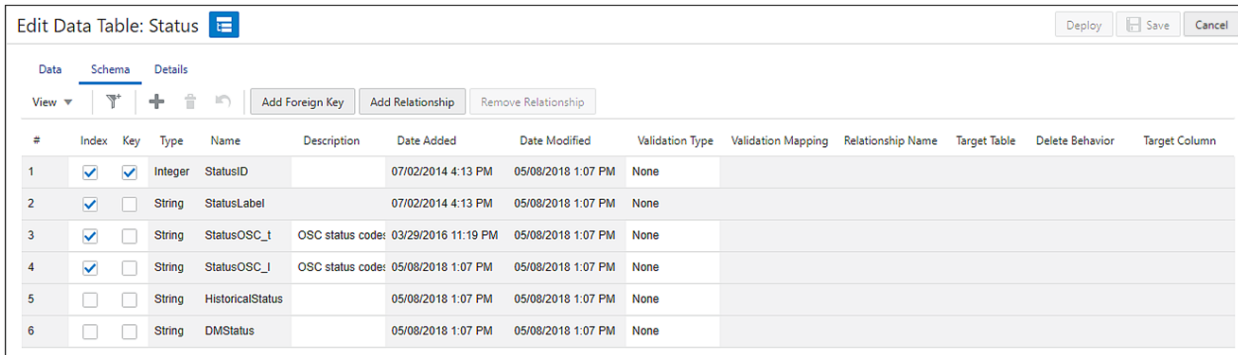


If the keyword is present in any column, the resulting lines are returned. To refine the advanced filter, click **Edit Filter**. To deactivate the filter, click on the Advanced Filter icon.



Data Table Schema Tab

The Schema tab defines the columns and data types that make up the data table. This tab supports add and delete actions as well as index, key, and validation functions. It also provides access to Foreign Key and Relationship management.

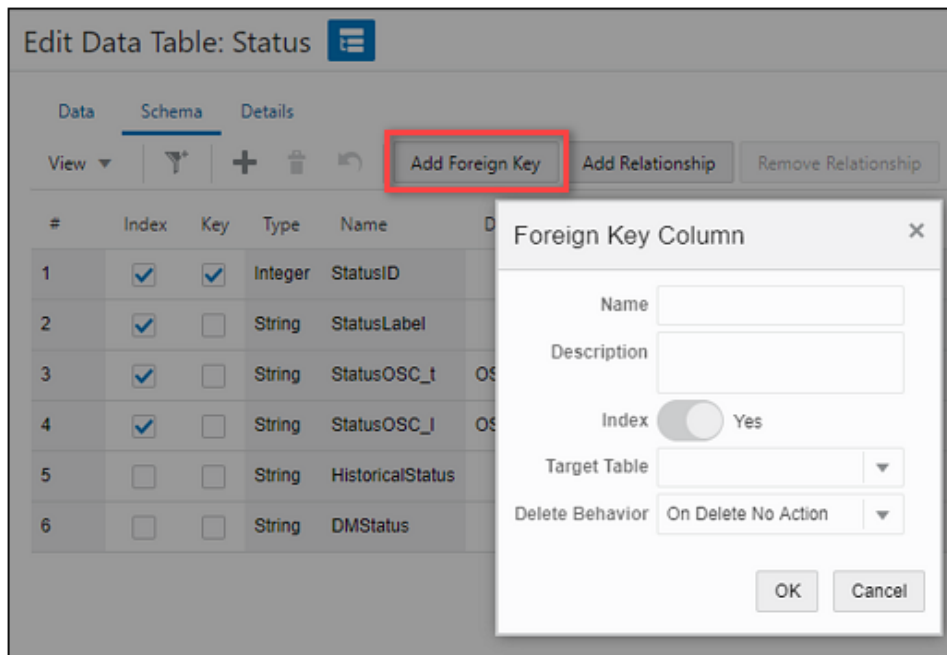


#	Index	Key	Type	Name	Description	Date Added	Date Modified	Validation Type	Validation Mapping	Relationship Name	Target Table	Delete Behavior	Target Column
1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Integer	StatusID		07/02/2014 4:13 PM	05/08/2018 1:07 PM	None					
2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	String	StatusLabel		07/02/2014 4:13 PM	05/08/2018 1:07 PM	None					
3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	String	StatusOSC_t	OSC status codes:	03/29/2016 11:19 PM	05/08/2018 1:07 PM	None					
4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	String	StatusOSC_l	OSC status codes:	05/08/2018 1:07 PM	05/08/2018 1:07 PM	None					
5	<input type="checkbox"/>	<input type="checkbox"/>	String	HistoricalStatus		05/08/2018 1:07 PM	05/08/2018 1:07 PM	None					
6	<input type="checkbox"/>	<input type="checkbox"/>	String	DMStatus		05/08/2018 1:07 PM	05/08/2018 1:07 PM	None					

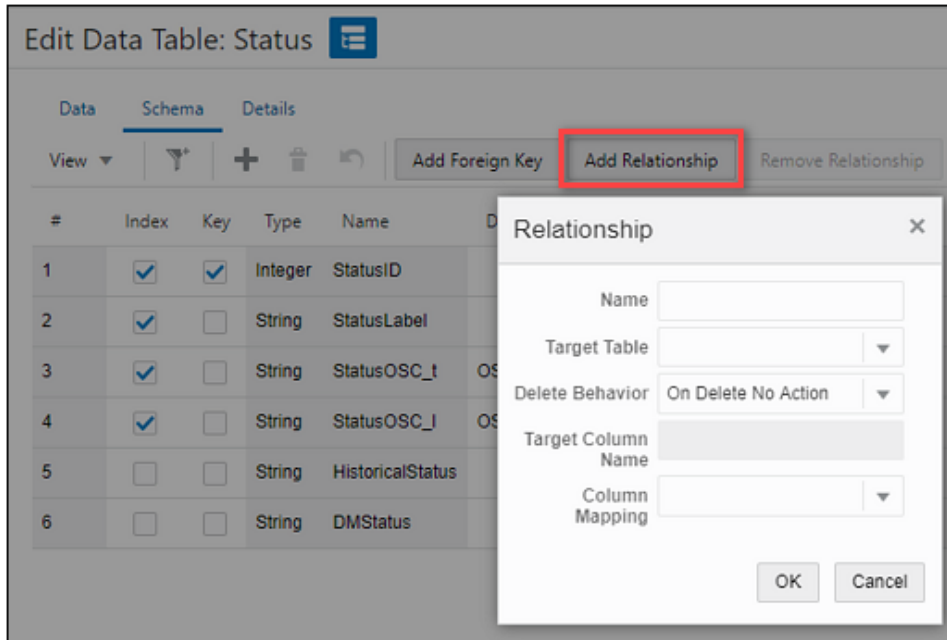
The JET column view and filters are also available on the schema tab. The Schema tab also provides an undo icon which allows administrators to undo the most recent unsaved action.

Foreign Keys define a relationship between multiple data tables, ensuring data integrity and consistency.

- To add a Foreign Key column, click "Add Foreign Key" and define the name, description, target table, and delete behavior.



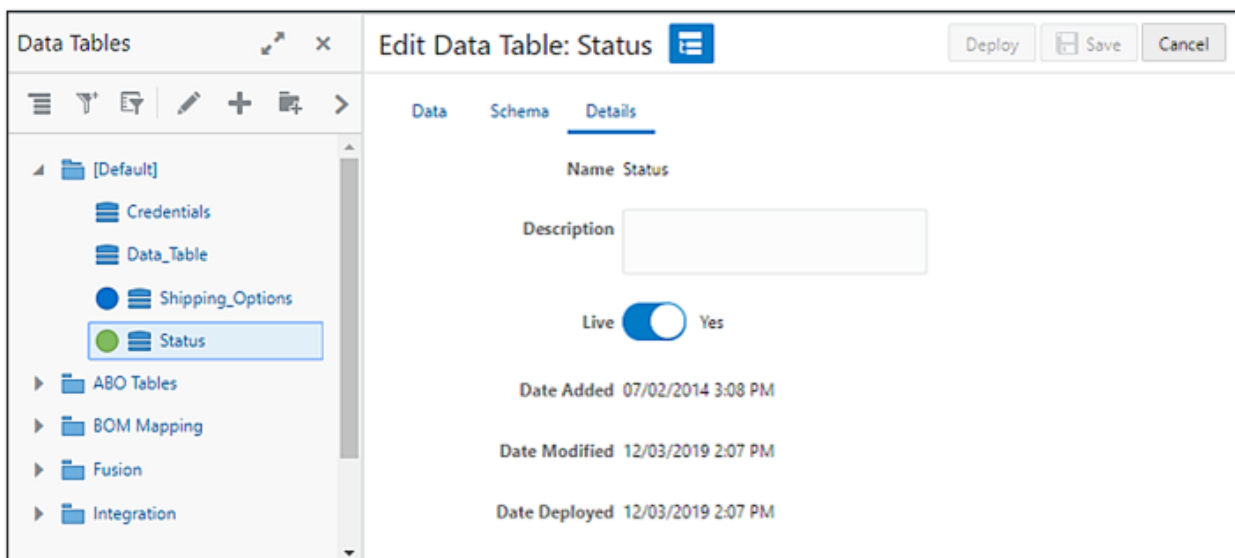
- To convert an existing column to a Foreign Key column, click "Relationship" and define the name, target table, delete behavior, target column name, and column mapping.



- To remove a Foreign Key relationship, select a column with a relationship and click "Remove Relationship".

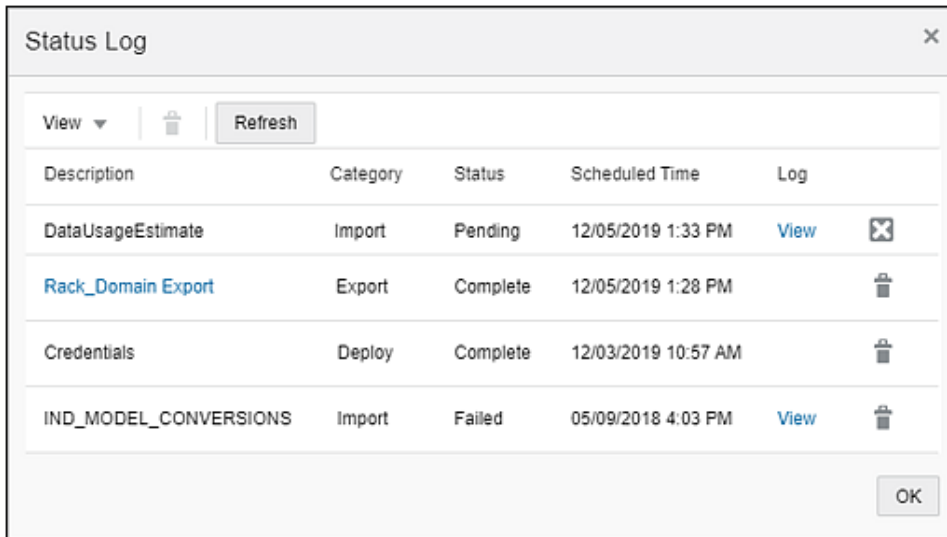
Data Table Details Tab

The new Details tab shows the date when the table was added, last modified and deployed. It provides the "Live" Data Table option, and allows administrators to add a description for the table.



Data Table Status Logs

In JET, administrators access the Status from the navigation panel toolbar menu. The status logs show status information for imports, exports, and deployments. It also provides links to error logs and export files, and allows cancellation of pending and in progress imports. The status log toolbar provides column view, delete, and refresh functions. Administrators can multi-select and delete multiple log items.

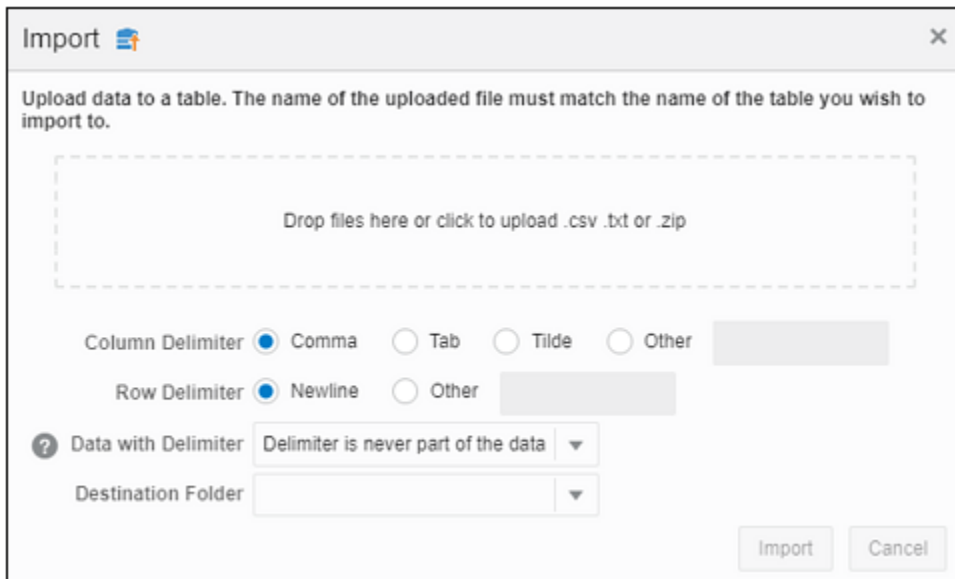


The screenshot shows a window titled "Status Log" with a close button (X) in the top right corner. Below the title bar is a toolbar containing a "View" dropdown menu, a trash icon, and a "Refresh" button. The main area is a table with the following columns: Description, Category, Status, Scheduled Time, and Log. The table contains five rows of log entries. At the bottom right of the window is an "OK" button.

Description	Category	Status	Scheduled Time	Log
DataUsageEstimate	Import	Pending	12/05/2019 1:33 PM	View
Rack_Domain Export	Export	Complete	12/05/2019 1:28 PM	
Credentials	Deploy	Complete	12/03/2019 10:57 AM	
IND_MODEL_CONVERSIONS	Import	Failed	05/09/2018 4:03 PM	View

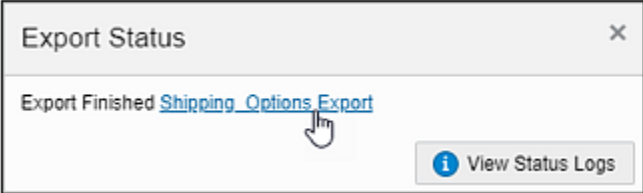
Data Table Import and Export

Administrators can access Import and Export functions from the navigation panel toolbar menu. They can also access the Export function by right-clicking on a data table. The Import UI provides the same functionality as legacy. It also allows administrators to drag and drop files for import. During import, a progress bar displays at the top of the Import UI.



The screenshot shows an "Import" dialog box with a close button (X) in the top right corner. The main text reads: "Upload data to a table. The name of the uploaded file must match the name of the table you wish to import to." Below this is a dashed box containing the text: "Drop files here or click to upload .csv .txt or .zip". Underneath the dashed box are radio buttons for "Column Delimiter" (Comma, Tab, Tilde, Other) and "Row Delimiter" (Newline, Other). There is a "Data with Delimiter" dropdown menu set to "Delimiter is never part of the data" and a "Destination Folder" dropdown menu. At the bottom right are "Import" and "Cancel" buttons.

For exports, an Export Status dialog appears to show the export progress. When the export is complete, administrators can download the exported file using the link from the Exports Status dialog or the Status Log.



STEPS TO ENABLE

You don't need to do anything to enable this feature.

JET USER INTERFACE

Introduced in Oracle CPQ 18C, the JET UI provides a modernized and responsive user experience. The responsive design provides layouts that can flow vertically to fit within different browser display widths and features a rich set of modern UI components with built-in accessibility and mobile support.

The following JET UI enhancements are available in Oracle CPQ 20A:

- JET Configuration and Transaction UI HTML Help Messages
- Enable AJAX for Configuration Rules with Array Attribute Inputs
- Export JET Transaction UI Line Item Grid to .XLSX File Format
- Default Array Column Width for JET Configuration UI
- JET Transaction UI Error Message Enhancements
- Manage Viewed Columns for JET Transaction UI Tables

JET CONFIGURATION AND TRANSACTION UI HTML HELP MESSAGE

Beginning in 20A, help messages can display Rich Text, links, and HTML content on the JET Configuration and Transaction UIs. The help icon will display plain text content in a tooltip format if there is no Rich text or HTML content present in that help icon's content.

For example, when HTML/Rich Text content is present, the user is prompted by a tooltip to click the icon which opens a dialog box containing the help information. The dialog box is automatically sized based on the content and browser size. The user can resize, move and close the dialog as desired.

The screenshot displays the 'Model Configuration' interface. At the top, there is a 'Total: \$0.00' and buttons for 'Update', 'Start Over', and 'Create Transaction'. Below this is a table titled 'Office Services' with columns for '#', 'Service Type', 'Duration', 'Number of Hours', and 'Number of Months'. A tooltip 'Click for help' is shown over the help icon in the 'Service Type' column of the first row. A dialog box titled 'Service Type' is open, showing a grid of service options:

	Water Service	Coffee and Tea	Snacks
Pantry Services			
Cleaning Services			
Restroom Services			

STEPS TO ENABLE

You don't need to do anything to enable this feature.

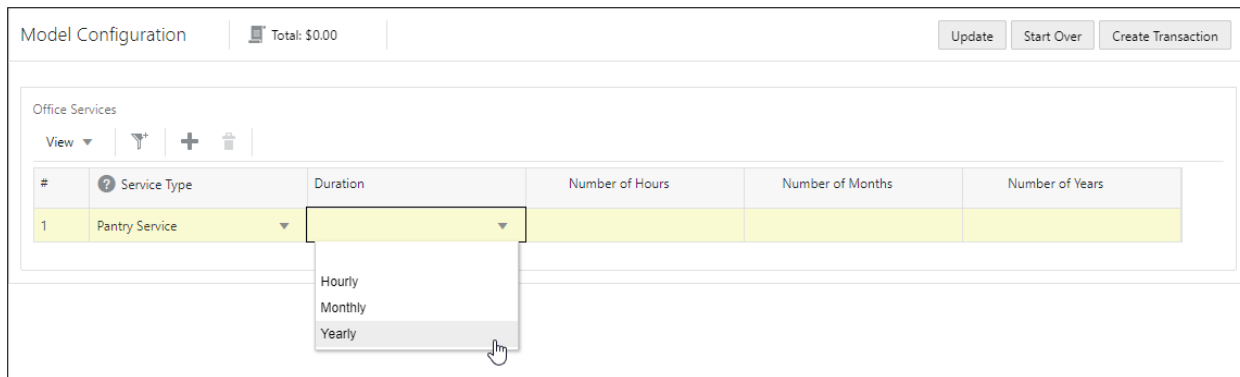
TIPS AND CONSIDERATIONS

Refer to the Configuration Attribute Help Icons topic in Oracle CPQ Administration Online Help for detailed help icon information and instructions.

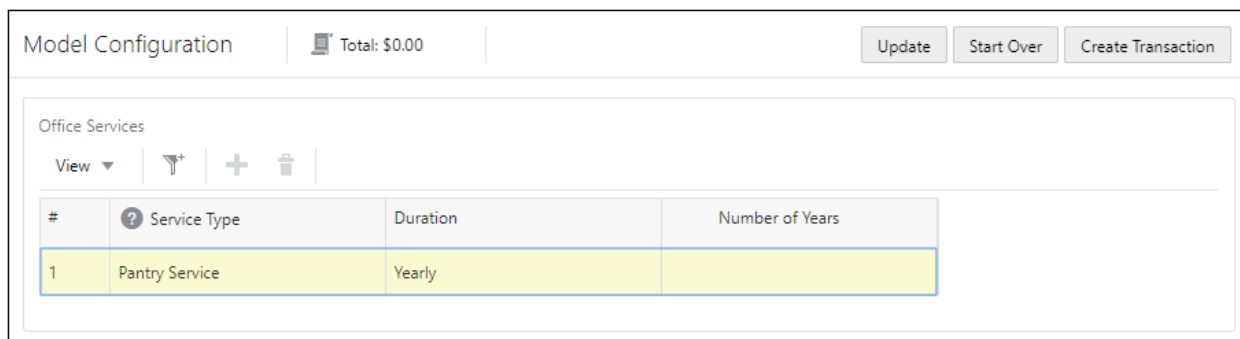
ENABLE AJAX FOR CONFIGURATION RULES WITH ARRAY ATTRIBUTE INPUTS

Beginning in Oracle CPQ 20A, administrators can enable AJAX for Configuration Constraint and Hiding rules that have array attributes for rule conditions or actions. Previously, Configuration rules with array attribute inputs were only evaluated if the attributes were set to auto update or if a user clicked the update action. With AJAX enabled, the rules are evaluated and the action is performed instantly when a user changes any rule input.

In the following example the administrator set up a rule to hide the Number of Hours, Number of Months, or Number of Years columns when the user selects array attribute item.



For example, when the user selects the "Yearly" Duration item the Number of Hours and Number of Months columns are hidden.



If multiple Duration items are added to the array items hidden items for associated lines are highlighted in gray and are not editable. For example, the Number of Hours and Number of Months cells for the row with a Yearly duration are gray and the Number of Months and Number of Years cells for the row with an Hourly duration are gray.

#	Service Type	Duration	Number of Hours	Number of Months	Number of Years
1	Pantry Service	Yearly			1
2	Restroom Service	Hourly	4		
3					

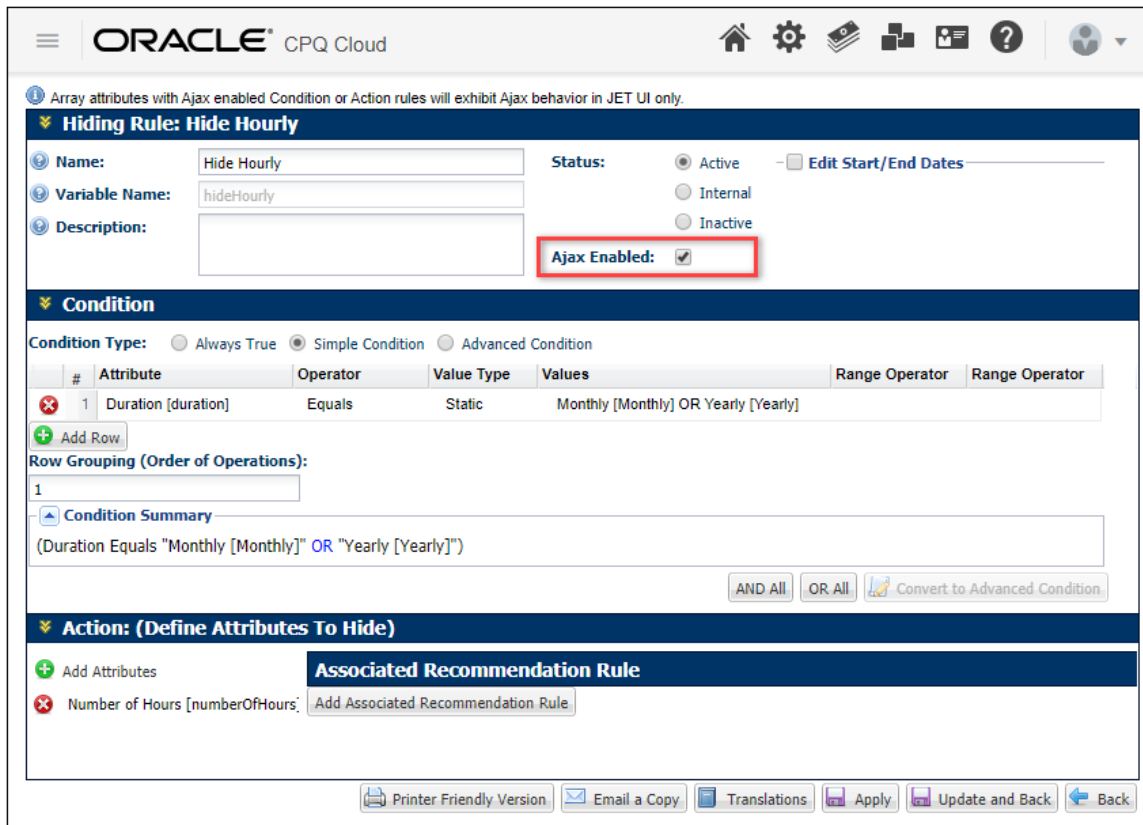
STEPS TO ENABLE

Complete the following steps to enable AJAX for a Configuration Constraint and Hiding rule that has array attributes for rule conditions or actions.

1. Navigate to the Admin page.
2. Select **Catalog Definition** in the Products section.
3. Navigate to the applicable Product Family, Product Line, or Model.
4. Select the applicable rule type:
 - **Constraints**
 - **Hiding Attributes**
5. Select the applicable rule, or click **Add** to add the new rule.

When adding a new rule, refer to the Configuration Rules topic in CPQ Administration Online Help for detailed instructions.

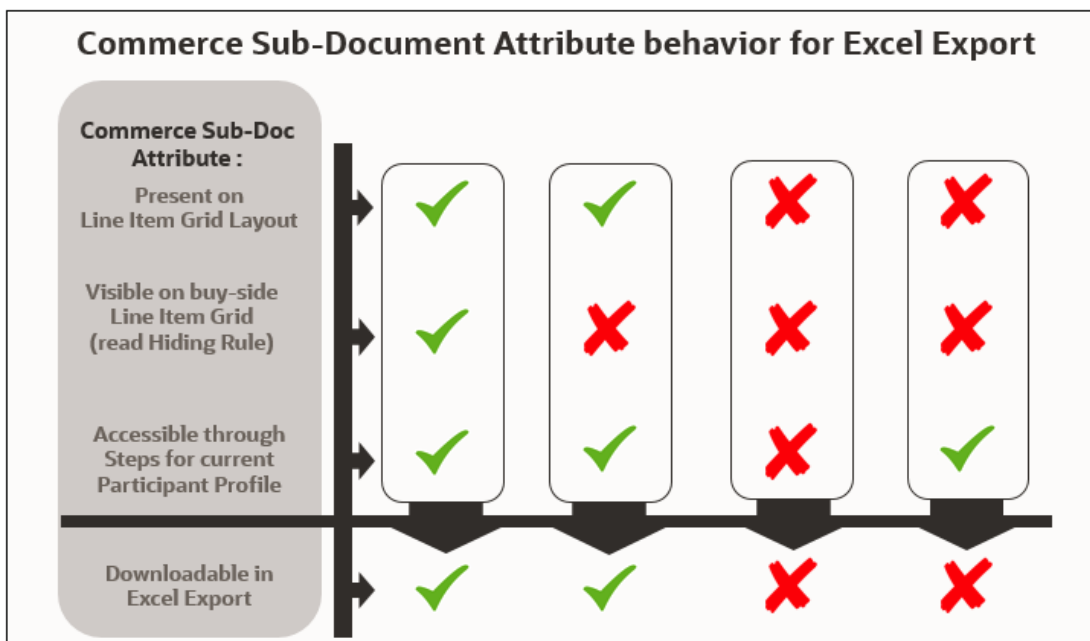
- Select the **Ajax Enabled** checkbox to enable AJAX functionality for JET Configuration UIs.



- Click **Apply** or **Update and Back** to save your changes.

EXPORT JET TRANSACTION UI LINE ITEM GRID TO .XLSX FILE FORMAT

Oracle CPQ 20A provides the ability to export Line Item Grid data to a Microsoft Excel (.XLSX) file on an end user's local computer. End users can export the current Transaction's line item information to run formulas and calculations on the Transaction data quickly and easily.



IMPORTANT: This feature is only available with JET Transaction UI.

Upon executing the Export action, users can download the Transaction Line Items with all the attributes currently accessible to them. The export includes all their viewable information from the Line Item Grid as determined by their user profile settings. If a Line Item Grid column is hidden from the end user by a Commerce hiding rule or a Line Item Grid view filter, that data is exported.

The screenshot shows the Transaction UI interface. At the top, there are buttons for Save, Submit, Lock Transaction, Delete Transaction, Back, View History, Customer Assets, and Pipeline Viewer. Below this, the Transaction Info section includes fields for Transaction ID (3022225963), Prepared By (Lisa Jones), and Total Discount % (0.0). The Status section shows Last Updated By (Lisa Jones), Last Updated (12/18/2019 2:35 PM), and Status (Ordered). Below the transaction info is the Items section, which contains a table with columns: Doc #, Seq #, Item, PDN, Quantity, List Price, Discount %, Unit Price, Configurabl..., and Subtotal. The table lists 7 items, including Cellular, Phone, Phone Case, Phone Holder, Head Phone, and Wireless Charger. At the bottom of the Items section, there are buttons for Add From Catalog, Copy Line Items, Reconfigure, Remove Sub, Update Line Items, and Export to Excel. The Export to Excel button is highlighted with a red box.

Sample Transaction Line Item Grid

IMPORTANT: Depending on the user's browser settings, the .xlsx file is either directly downloaded to the user's local computer or a download prompt is displayed.

The screenshot shows an Excel spreadsheet titled '3022225963_2019-12-18.xlsx'. The spreadsheet contains the following data:

Identifier	Doc #	Seq #	Item	PDN	Quantity	List Price	Discount %	Unit Price	Configura	Hidden from Y	Subtotal
UESDBBQ/2		1	Cellular		1	0	0	0	0	Hidden Value	0
UESDBBQ/3		2	Phone	Phone	1	600	0	600	600	Hidden Value	600
UESDBBQ/4		3	Phone Case	Phone Case	1	50	0	50	50	Hidden Value	50
UESDBBQ/5		4	Phone Holder	Phone Holder	1	25	0	25	25	Hidden Value	25
UESDBBQ/6		5	Head Phone	Head Phone	1	50	0	50	50	Hidden Value	50
UESDBBQ/7		6	Wireless Charger	Wireless Charger	2	90	0	90	90	Hidden Value	180

Sample Exported Excel File

The exported Excel filename includes the Transaction ID (`bs_id`) and date of the export request. For example, `3022225963_2019-12-18.xlsx`. Within the `.xlsx` file, the Excel sheet is given the Transaction ID (`bs_id`).

The first row of the Excel sheet is a header row that provides the Line Item Grid column labels. Each subsequent row corresponds to a specific line item and the cells in the row contain the values for the labeled columns.

The first column of the Excel sheet is an "Identifier" column. This column provides encoded hierarchical information regarding Model and part relationships for the line items. This information is for internal use and should not be modified.

In the above example, column K is labeled "Hidden From You" with the row values showing "Hidden Value" to indicate this type of hidden data. However, if the end user's participant profile hides an attribute for the current step they are on, that information is not exported.

STEPS TO ENABLE

Administrator must create an Export Line Items Commerce action to facilitate exporting line item information from the current Transaction. Refer to the Oracle CPQ Administration Online Help for instructions and video for adding a new Commerce action.

Once the Export Line Items action is created, administrators must add this action to an Action Bar in the JET Transaction Layout for end customer access. Refer to Oracle CPQ Administration Online Help for details on adding an action to the JET layout.

TIPS AND CONSIDERATIONS

- Export uses the current user's language when exporting.
- Currency attributes are treated as float attributes types.

IMPORTANT: Care should be taken by the end user when exporting a Transaction's Line Item Grid while the Transaction is in active Collaborative Quoting mode. The `.xlsx` file is a snapshot of the Line Item Grid taken when the Export Line Items action is invoked. Changes to the Line Item Grid by a collaborator can make the export file information out of date.

DEFAULT ARRAY COLUMN WIDTH FOR JET CONFIGURATION UI

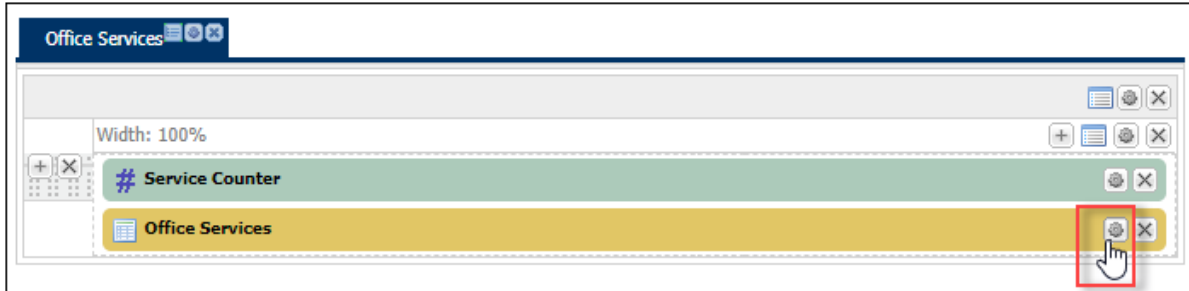
Oracle CPQ 20A allows administrators to set default horizontal and vertical array column widths for the JET Configuration UI. In prior releases array columns were set to a default of 200px wide. Users will still be able to resize column widths as desired.

STEPS TO ENABLE

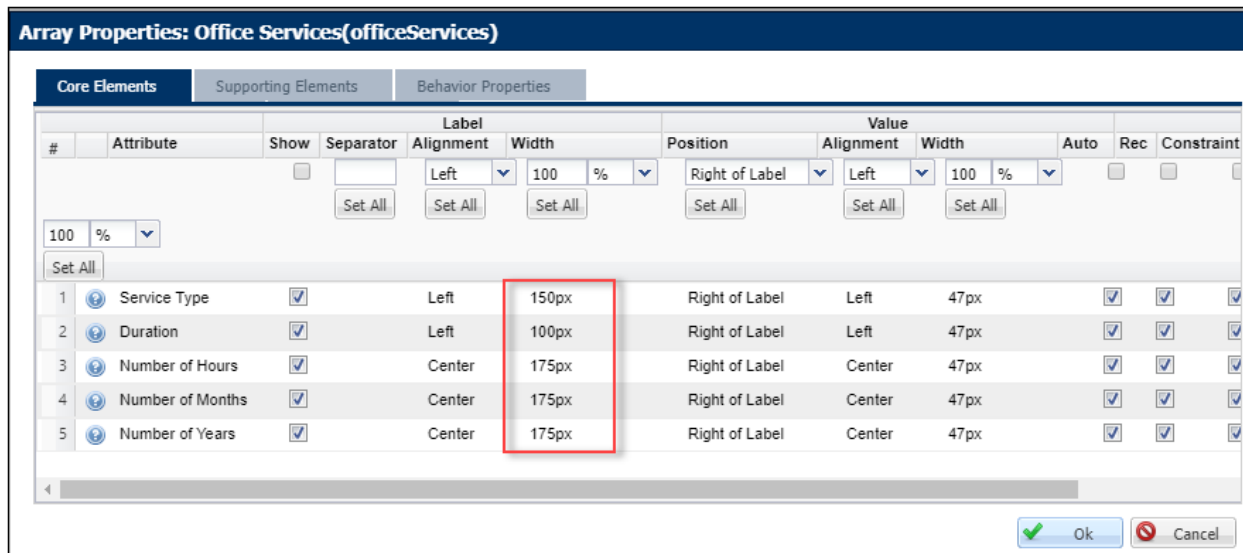
Complete the following steps to set default horizontal and vertical array column widths for the JET Configuration UI.

1. Navigate to the Admin page.
2. Select **Catalog Definition** in the Products section.
3. Navigate to the applicable Product Family, Product Line, or Model.
4. Select **Configuration Flows** and then click **List**.
5. Select the applicable Configuration Flow.

6. Select **Desktop** from the Layout drop-down menu.
7. Click on the Edit icon for the applicable array attribute.



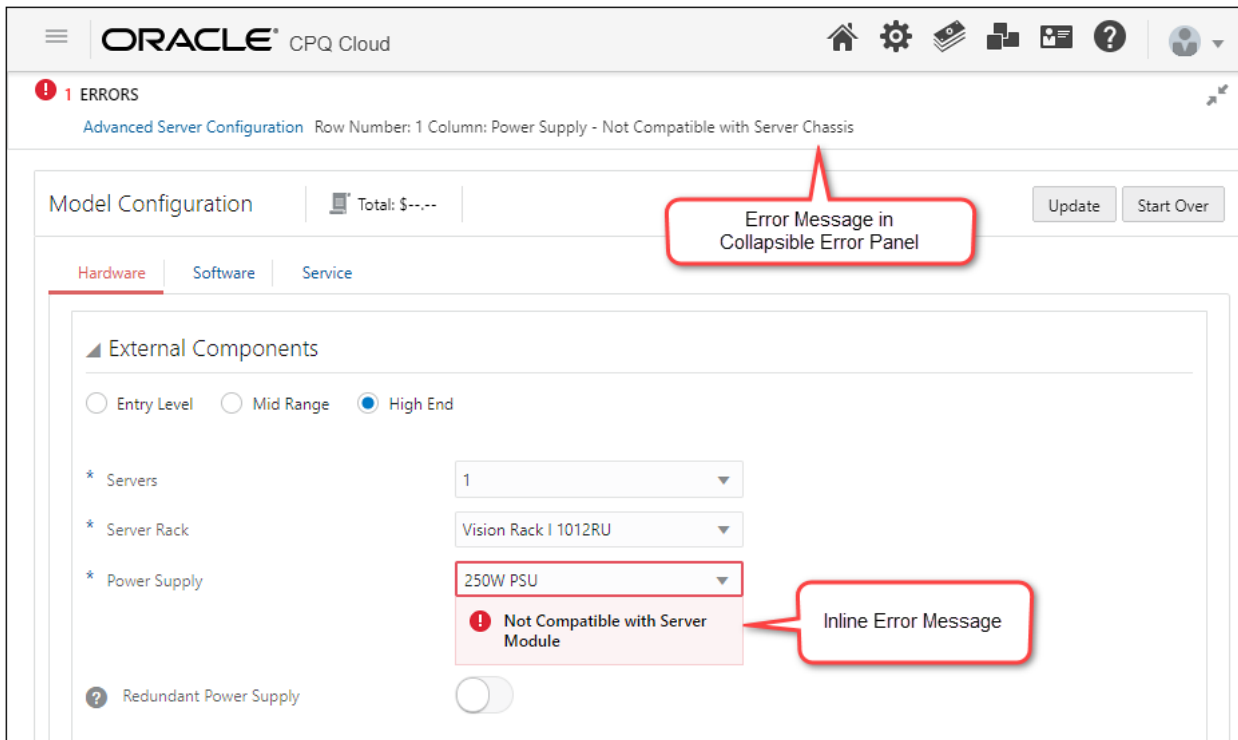
8. Set the column width to the desired value.
 - For the Vertical display type the column width is set using the label width value for each array attribute.
 - For the Horizontal display type the column widths are set using Label and Value widths for the first array attribute.



9. Click **OK** to save the Array Properties.
10. Click **Save**.

JET TRANSACTION UI ERROR MESSAGE ENHANCEMENTS

Oracle CPQ 20A provides several error message enhancements for the JET Transaction UI. Similar to the JET Configuration UI, the JET Transaction UI errors will now display inline and in a collapsible sticky header bar Error Panel. The Error Panel provides a consistent look and feel and improves usability.



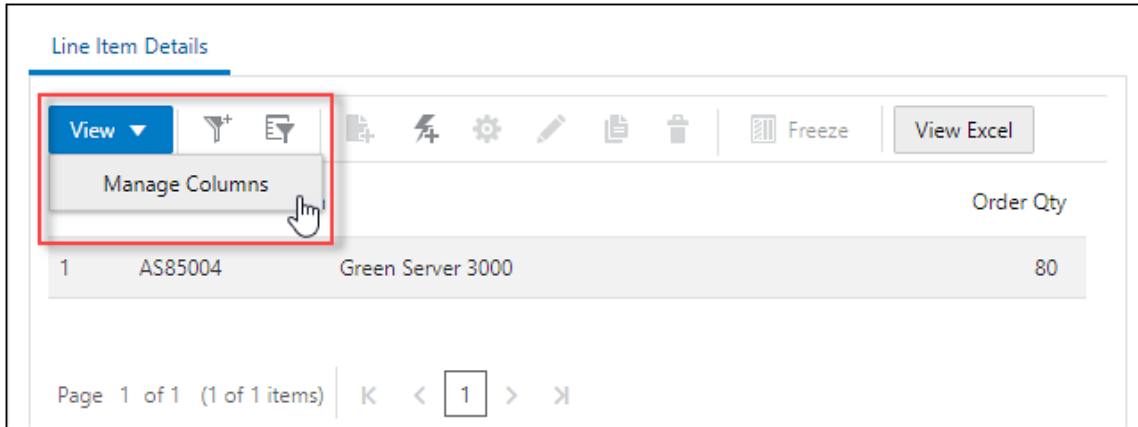
STEPS TO ENABLE

You don't need to do anything to enable this feature.

MANAGE VIEWED COLUMNS FOR JET TRANSACTION UI TABLES

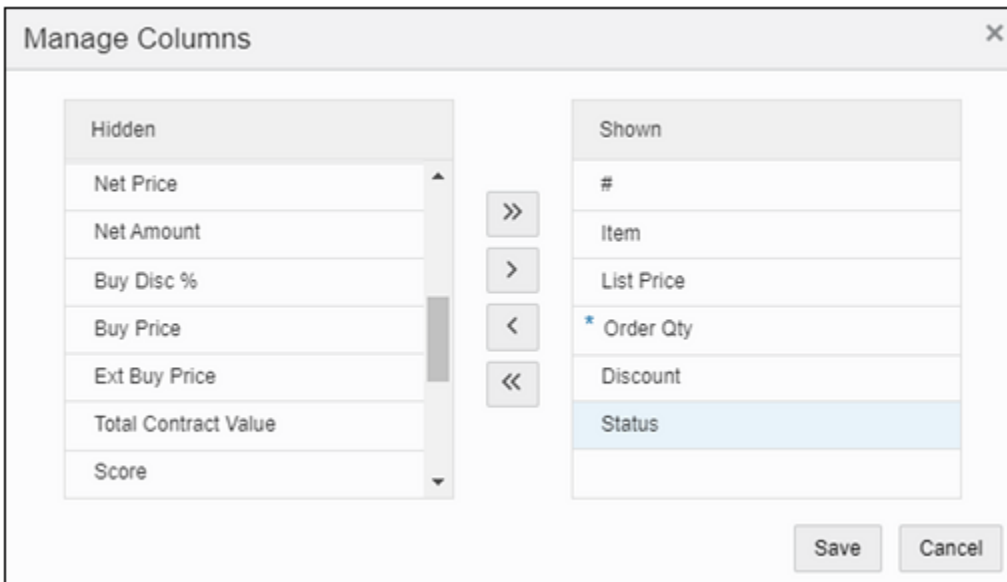
Oracle CPQ 20A provides a new Manage Columns dialog for JET Transaction UI tables, such as the Line Item Grid and Transaction Arrays. Previously, users could only show or hide columns one column at a time, which was very time-consuming for tables with a large number of columns. The Manage Columns dialog allows users to quickly hide or show multiple columns.

Users select **Manage Columns** from the View menu to select columns for the JET Transaction UI table.



To show columns, use the shuttle controls to move columns from the **Hidden** list to the **Shown** list.

To hide columns, use the shuttle controls to move columns from the **Shown** list to the **Hidden** list.



STEPS TO ENABLE

You don't need to do anything to enable this feature.

TIPS AND CONSIDERATIONS

Required attributes are indicated with an asterisk (*) in the Hidden and Shown lists.

The following Web Services feature is available in Oracle CPQ 20A.

SALES USER ACCESS TO BUY-SIDE GET METADATA REST APIS

Oracle CPQ 20A allows sales users access to Get REST APIs which provide Commerce and Configuration buy-side metadata information. Sales users include Sales Agents, Channel Agents, Restricted Access users, and Guest users.

The buy-side metadata includes the commerce and configuration metadata necessary to develop a User Interface—be that a traditional web UI or digital assistant UI. This feature allows sales users to view the following information:

- Layout details
- Translated labels
- Action and attribute types
- Attribute input parameters (for example, menu entries, text length, date range, etc.)
- Display properties (for example, radio buttons, switches, checkbox, etc.)

Sales Agents, Channel Agents, Restricted Access, and Guest users (if enabled on the site) are granted access to the following Get Configuration REST APIs:

Configuration Layout

- Get Product Family Layout
- Get Product Line Layout
- Get Model Layout

Configuration Process Invocation

- Get Process Invocations on All Pages
- Get Process Invocations for a Specific Page
- Get Process Invocation Actions for a Specific Page
- Get Process Invocation Action for a Specific Page

Configuration Product Family Integration

- Get Product Family Integration Metadata
- Get Product Family Integrations Metadata

Configuration Metadata

- Get Product Families Metadata
- Get Product Family Metadata
- Get Product Lines Metadata
- Get Product Line Metadata
- Get Models Metadata
- Get Model Metadata

Configuration Attributes Metadata

- Get Product Family Attributes Metadata
- Get Product Family Attribute Metadata
- Get Product Line Attributes Metadata
- Get Product Line Attribute Metadata
- Get Model Attributes Metadata
- Get Model Attribute Metadata

Configuration Array Sets Metadata

- Get Product Family Array Sets Metadata
- Get Product Family Array Set Metadata
- Get Product Line Array Sets Metadata
- Get Product Line Array Set Metadata
- Get Model Array Sets Metadata
- Get Model Array Set Metadata

Configuration Array Set Attributes Metadata

- Get Product Family Array Set Attributes Metadata
- Get Product Family Array Set Attribute Metadata
- Get Product Line Array Set Attributes Metadata
- Get Product Line Array Set Attribute Metadata
- Get Model Array Set Attributes Metadata
- Get Model Array Set Attribute Metadata

Configuration Attribute Menu Items Metadata

- Get Product Family Attribute Menu Items Metadata
- Get Product Family Attribute Menu Item Metadata
- Get Product Line Attribute Menu Items Metadata
- Get Product Line Attribute Menu Item Metadata
- Get Model Attribute Menu Items Metadata
- Get Model Attribute Menu Item Metadata

Configuration Array Set Attribute Menu Items Metadata

- Get Product Family Array Set Attribute Menu Items Metadata
- Get Product Family Array Set Attribute Menu Item Metadata
- Get Product Line Array Set Attribute Menu Items Metadata
- Get Product Line Array Set Attribute Menu Item Metadata
- Get Model Array Set Attribute Menu Items Metadata
- Get Model Array Set Attribute Menu Item Metadata

Configuration Items Metadata

- Get Recommended Items Metadata

Sales Agents, Channel Agents, and Restricted Access users are granted access to the following Get Commerce REST APIs. Guest Users are not allowed access to the Commerce REST API information.

Commerce Layout

- Get Commerce Document Layout

Commerce Metadata

- Get Commerce Documents Metadata
- Get Commerce Document Metadata
- Get Commerce Actions Metadata
- Get Commerce Action Metadata
- Get Commerce Array Sets Metadata
- Get Commerce Array Set Metadata
- Get Commerce Array Attributes Metadata
- Get Commerce Array Attribute Metadata
- Get Commerce Attributes Metadata
- Get Commerce Attribute Metadata
- Get Commerce Menu Items Metadata
- Get Commerce Menu Item Metadata
- Get Commerce Action Translations
- Get Commerce Action Translation
- Get Commerce Attribute Translations
- Get Commerce Attribute Translation
- Get Commerce Menu Item Translations
- Get Commerce Menu Item Translation

STEPS TO ENABLE

To enable this feature you need to log a Service Request (SR).

IMPORTANT: This feature should only be enabled if there is a specific need to expose the metadata (i.e. digital assistant). If Guest access is permitted for the site and this feature is enabled, Configuration Metadata REST API information is exposed to the public internet.

TIPS AND CONSIDERATIONS

This feature does not change the accessibility of administrator-only metadata. Sales users are not able to access the metadata REST API information for the following:

- Data Tables
- BML
- Rules
- Formulas

PRE-UPGRADE CONSIDERATIONS

MODIFICATIONS TO KNOWN FUNCTIONALITY

The following modifications to known functionality are available in 20A:

- The Configuration Bulk Add to Transaction version 9 REST API is updated to support the `legacyMode` request body parameter. This boolean parameter determines the API execution behavior. When true, the API honors CPQ legacy Configuration Layout Flow behavior, with the relevant attribute values to be overridden as defined in the current CPQ legacy Configuration Layout Flow. When false, the API does NOT honor CPQ legacy Configuration Layout Flow and the API will invoke all attributes and rules that are available for the specified model. The default value is 'false'. Refer to the Oracle CPQ Administration Online Help for more information.
- If "Execute Action If Associated Integrations Timeout" is selected for the Reconfigure Inbound Action, an integration timeout warning should be provided when you enter commerce; however, this warning is not displaying in Oracle CPQ 20A. As a workaround, we recommend you not select "Execute Action If Associated Integrations Timeout" for this action. By doing this, the Reconfigure Inbound Action will fail if integration has timed out.
- In an Oracle CPQ and Oracle CX Sales integration, formerly called Oracle Sales/Engagement Cloud, you may receive an error message when selecting quotes on the Quotes and Orders page. If you click OK on the message, you can open the quote.
- Although the default was changed to Antenna House in a prior release, Oracle CPQ 20A supports both Antenna House and Apache FOP for XSL/XML formatting. However beginning in Oracle CPQ 20B, we will not be supporting Apache FOP. We recommend you plan for this transition.

CUSTOM JAVASCRIPT

If customers have added custom JavaScript that leverages the Document Object Model structure or specific elements, classes or IDs, this customization should be thoroughly tested and may require refactoring. For more information about custom JavaScript, go to Style & Templates > JET JavaScript Customization in the Oracle CPQ Administration Online Help.

MIGRATION

When migrating directly from a source site or to a destination site using the Migration Center, both sites must use the same major update. The migration of content can only occur across minor updates within the same major update.

- “Major update” = Update 20A
- “Minor update” = Update 20A Patch 1

For Oracle CPQ 20A, migration packages from 19A and forward can be uploaded to the latest site version.

RESOLVED KNOWN ISSUES

For information on bugs fixed in Update 20A, refer to the Oracle CPQ 20A Resolved Known Issues document available on [My Oracle Support](#) and the Oracle CPQ Administration Online Help.

TRANSLATION

For some system-defined messages and components, strings were removed and others added in Oracle CPQ 20A. If you have created your own implementation-specific translations of system-defined strings, some of these strings may no longer appear. Other strings may appear in English. The strings appearing in English are new and require translation.

Most of these messages and components are on the Administration side of Oracle CPQ, but you should review both your end user and administration pages before deploying your updated installation to confirm that all strings appear in the desired language.

Oracle CPQ supports the consumption of both single and multi-byte character sets. Submit a service request on [My Oracle Support](#) to enable your site for a new language.

For the following languages, a translation of the Oracle CPQ user interface is available for both the platform and the reference application:

- Chinese (Simplified) [China]
- Chinese (Traditional) [Taiwan]
- Czech [Czech Republic]
- Danish [Denmark]
- Dutch [Netherlands]
- English
- Finnish [Finland]
- French
- French [Canada]
- German
- Hungarian [Hungary]
- Italian
- Japanese [Japan]
- Korean [South Korea]
- Norwegian (Bokmål) [Norway]
- Polish [Poland]
- Portuguese [Brazil]
- Romanian [Romania]
- Russian [Russia]
- Spanish (Worldwide)
- Swedish [Sweden]
- Turkish [Turkey]

POST-UPGRADE CONSIDERATIONS

Upgrade and test all test instances on Oracle CPQ 20A before upgrading to production.

BROWSER SUPPORT

Oracle CPQ supports all browser versions that meet the criteria of the Oracle Software Web Browser Support Policy.

If you experience issues using a supported browser version, open a ticket on [My Oracle Support](#) to resolve the issue. If an issue arises when using a supported browser, use a certified browser version until the delivery of a fix. Certified browsers are selected based on current market share and thoroughly tested to work with the current version's standard functionality.

Certified Browsers

Windows

- Google Chrome 79.x
- Mozilla Firefox 71.x
- Internet Explorer 11.x

IMPORTANT: Compatibility issues with the selected browsers may exist when sites contain additional JavaScript, alternate CSS, or other custom functionality. Customizations may require add-on work. Contact [My Oracle Support](#) to determine the availability of workarounds and minor fixes.

SALESFORCE INTEGRATION SUPPORT

Oracle officially supports version 8.1 and version 8.2 of the Oracle CPQ Connector for Salesforce. We also continue to support version 7.2 of the legacy Oracle CPQ Commerce Integration.

IMPORTANT:

- With the Spring 20 release, Salesforce is automatically enabling the new Salesforce Mobile App for all customers. There are potential compatibility issues between the new Salesforce Mobile App and the Oracle CPQ Mobile experience and at this time it is not supported. Users can continue to access Oracle CPQ from within Salesforce via mobile browsers.
- Previous versions of the Oracle CPQ packages are expected to continue to function; however Oracle will not address new issues that arise. We strongly encourage customers to upgrade to the latest supported version.

TRAINING

Please refer to the release documentation for all versions between your current version and the version to which you are upgrading to see all new functionality, resolved known issues, and functional known issues.

Refer to the Oracle CPQ Administration Online Help to become familiar with the new features introduced in Oracle CPQ 20A. For additional help, see [My Oracle Support](#).

Verify any information not explicitly mentioned in this document as supported by the software against the product help for Oracle CPQ 20A or the Oracle CPQ Consulting team.

ADDITIONAL INFORMATION

For more information on Oracle CPQ, visit the Oracle CPQ documentation site.

DISCLAIMER

The details in this document are provided for high-level informational purposes only and are not intended to function as a specification or to replace the Online Help. Upgrading to a subsequent release may require the re-deployment of Commerce Processes, Configuration, or global function settings. Modifications to integration XSL files or APIs may also be required.



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