Apttus CLM Curriculum

Application Fundamental

- Introduction to Quote to Cash
- Introduction to Apttus
- CPQ Background & Overview
- Standard functional flow.
- Key Apttus terminology

Product Management

- To create a product (Standalone, Bundle and Option)
- Manage Categories and Hierarchy Manager
- Create Price List, Price List Item

Product Management- Bundle, Options and Option Group

- To create Bundles, Options and Option Groups
- To associate Option Groups to a
- Bundle Associating a Product to a
- Category Field Expression
- Executing maintenance jobs Adding product to a cart page
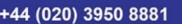
Product Attributes and Attribute Groups

- Create a product attribute field
- Product Attributes Overview
- Creating a product attribute group
- Linking Attribute Group to a
- Product Attribute Rule
- Executing maintenance jobs

Product Visibility Rule

- Search Filters(CPQ)
- Run the Product Filter Criteria Maintenance Configuring a Product Group
- To create a product group
- To add a product group member

Pricing Management

- Price List Item
- Price Matrix Terminology
- Creating Price Dimension
- Create condition base price matrix
- How to create a Price Rule set
- Creating a Price rule
- Tiered Pricing
- Related Pricing

Rule Management

- Creating Constraint Rule Header
- Creating Constraint Rule Condition
- Setting up Inclusion Rules
- Setting up Exclusion Rules
- Setting up Validation/Warning Rules
- Creating Constraint Rule Action
- Executing maintenance jobs

Template Management

- Introduction to X-Author
- Installing X-Author
- Template Creation
- Template Settings
- Manage Template

Overview of custom settings

- System Config
- Properties Display Action
- Cart Setting
- Display Column

Quote Management

- Quote Lifecycle
- Creating Quote/Proposal
- Configure Product
- Cart Finalization

Troubleshooting

For More Info:

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