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Customization Guide - SAP CPQ - Callidus

Version

This article was created using the 2011 version of SAP CPQ Former (Callidus)

Brief Description

During a CPQ's implementation, SAP allows you to import product in an easy way. Using the standard functionality "Import Products" is possible to import records into CPQ's database through CSV file.

I hope you enjoy it!!

Author

I started my career in 1992, working with corporative solutions in mining companies. In 1999, I changed my professional perspective and started my first project in CRM business, using Vantive in Telecom Industries, which I spent 8 years working as CRM Telecom Solution Architect.

Then, in 2006 I was invited to work on my first project as SAP CRM Functional Consultant in Utilities. I have plenty of experience in different modules and submodules inside of SAP CRM. I am an expert in the Interaction Center, Sales, Services, Marketing, and ERP Integrations.

Besides the baseline of SAP CRM, I had the opportunity to work in a different line of business, as Goods, Trade Promotion, Media, Call Center, Mining, Utilities, Heavy Machinery.

With the SAP Cloud technologies, I've become an expert in Cloud solutions and Customer Experience using the platform C4hana (C4Sales, C4Services, Marketing, Qualtrics, CDC/Gigya, CPQ/Callidus).

During those projects, the integration with SAP ERP (ECC and S4hana) became obligatory and the understanding of the integration between S4hana and C4hana was extremely necessary to adequate the CX process and ERP process.

Considering the integration between SAP C4hana and S4hana. It became so necessary, then I concentrate my energy to understand how it works. Today I am an expert in integrating SAP C4hana and S4hana using SAP Cloud Platform Integration.

Below I will describe all points of my carrer and just in case you have doubts about any points, please let me know.

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1. Article

1.1. Description

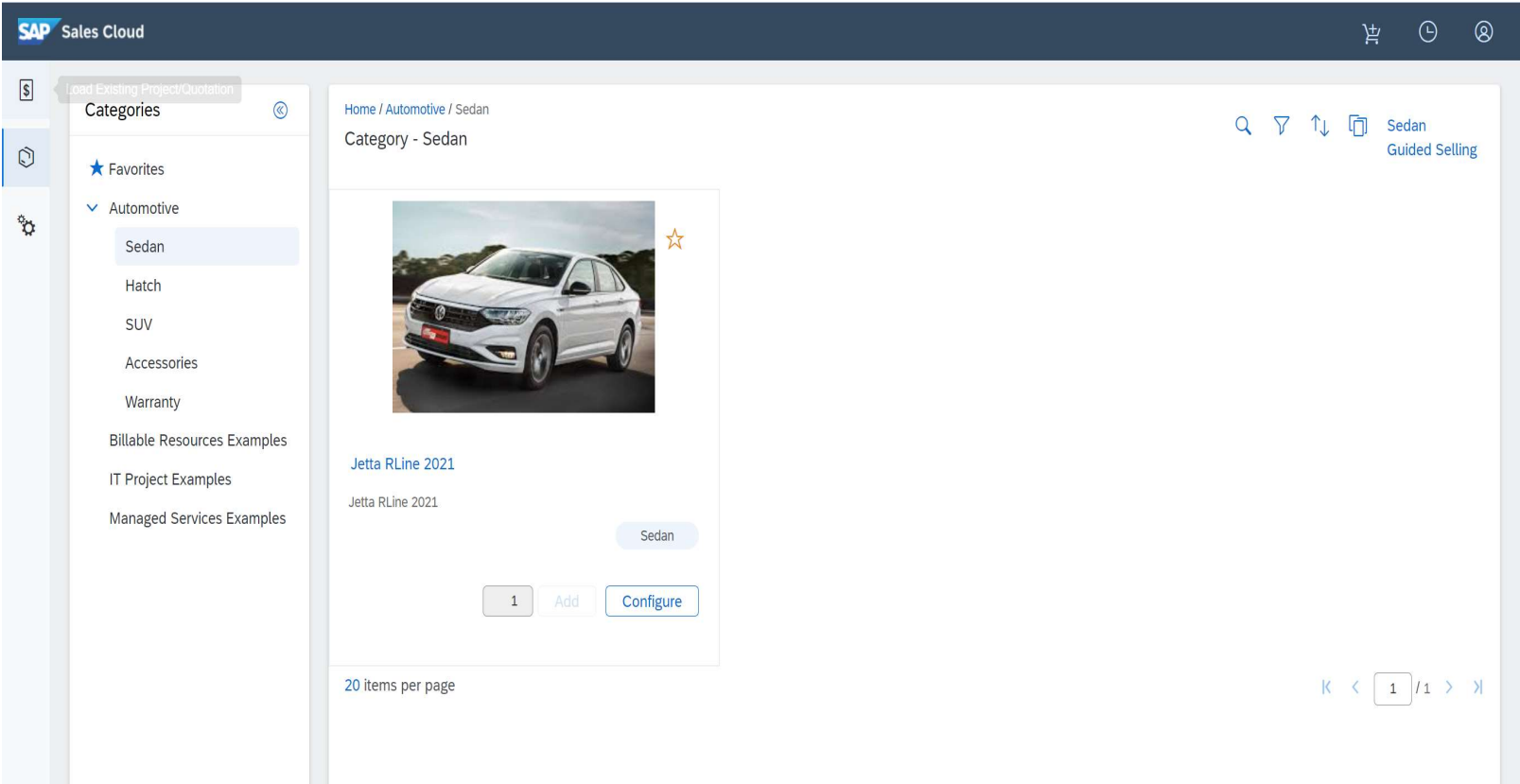
During a project, the migration data is always a painful activity. But NOT with SAP CPQ platform. The CPQ's Import tool is easy and flexible, allowing you import thousands of records in seconds. This document will provide some tips to make your data import activity an amazing experience.

Let's check it out!!

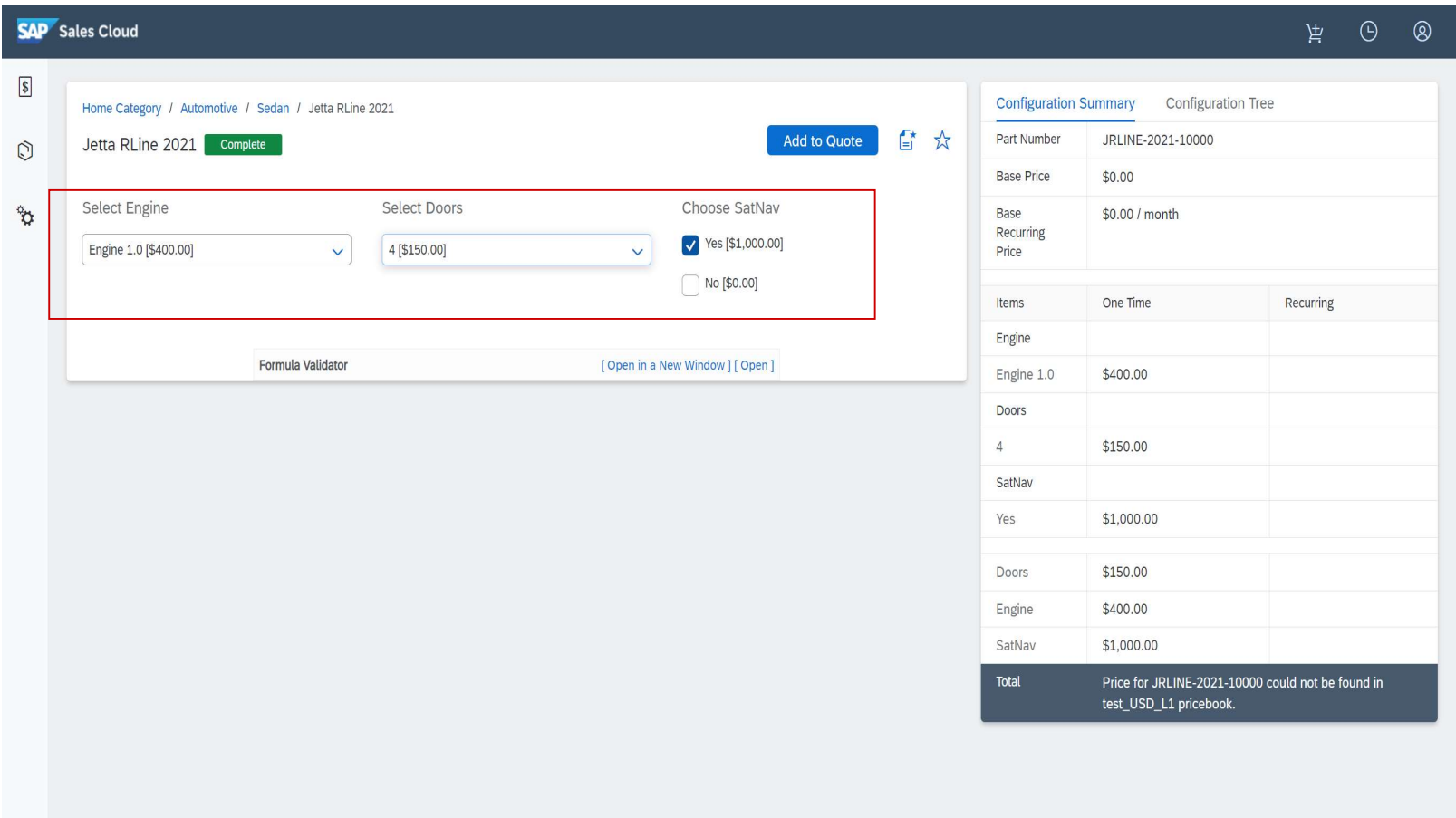
1.2. Checking our Car Model

I will create 3 new cars (BMW, Ferrari, and Mercedes). To start our data import, I will take the car "Jetta Rline 2021" as our model record.

Below, I will demonstrate how Jetta Rline it is.



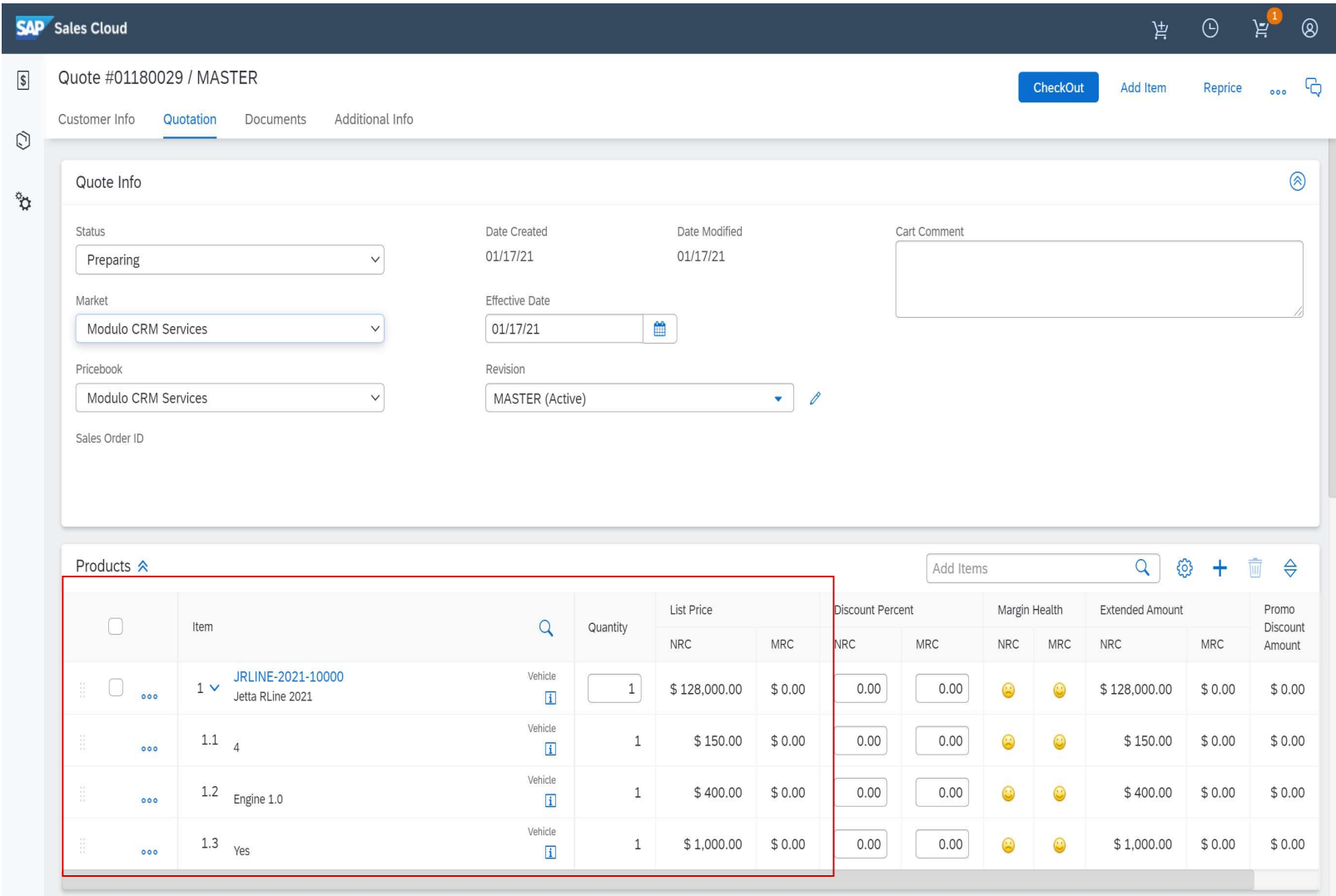
As a configurable product, Jetta has 3 fields (Engine, Doors, SATNAV). That's obvious, I am not an expert in cars!! But those fields will make my point of this article.



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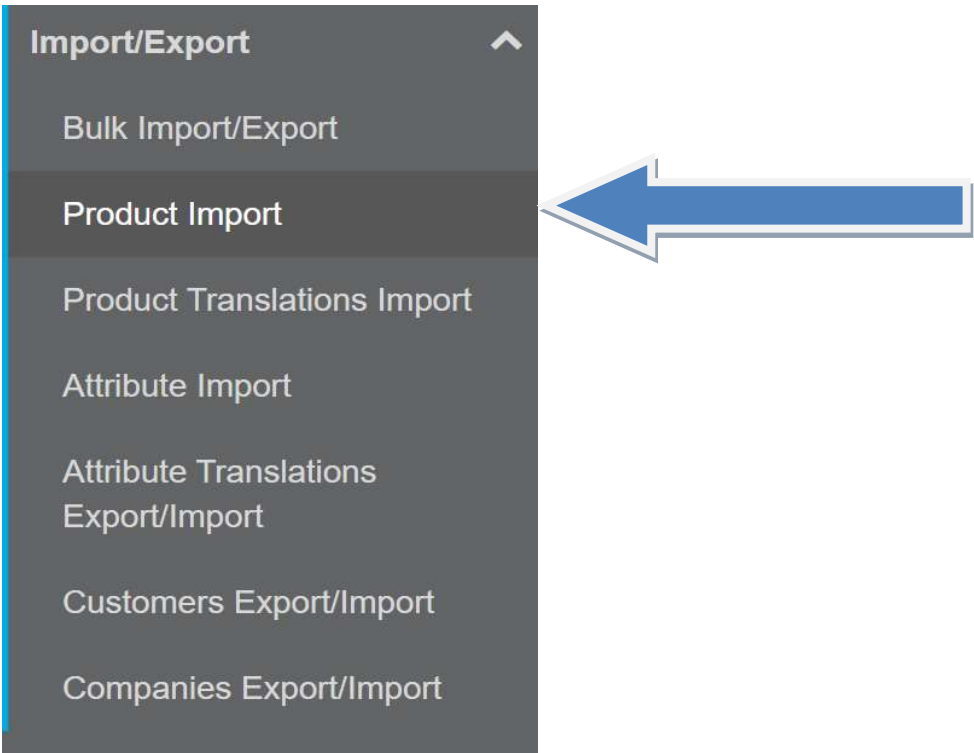
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That’s is the quote to Jetta Rline



1.3. Downloading the Product Template

After checking my template car out, I will download that car as a template. Click the link “Bulk Import Export>Product Import”.



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That functionality allows you to download templates in different ways using the object products.

Product Import

Step 1

Download Excel Template with sample data or Download Existing Products into Excel Template

Sample Data



Sample Products
(Click to download file)

Export Products

Create Template by Exporting Products from Select Categories

 or

Create Template by Exporting All Products

 or

Search for products to export

Step 2

To accomplish my objective, I need to define what will be the products primary key. It can be done with Part Number, External ID, MPN, CPQ ID and much more.

Step 2

Populate template with your product data. During import, all products above the first empty row in the file are imported. After the empty row is found, all other rows under it are ignored.
When importing products, you don't need to upload all columns. If you leave out columns that you don't need, it will take less time for system to process products.
Maximum number of products that can be imported through one file is 2500.
When updating products, limit is extended to 20000 products if imported file contains only columns from the list:
ExternalID, UPC, MPN, Inventory, LeadTime, FamilyCode, Active, Product Name, ID, Part Number.

Step 3

Specify product identifier which will be used as criteria to determine if a new products will be added or existing products will be updated

☐ Part Number

☐ Product Name

☐ External ID

☐ UPC (Universal Product Code)

☐ MPN (Manufacturer Part Number)

☒ CPQ ID

☐ Product Family Code

☐ None (product is always created)

Step 4

Select and Upload the file with your product data. File formats that you can upload are xlsx and xls. Cells with data type "date" are only supported for xlsx file format.

Escolher arquivo

Nenhum arquivo selecionado

Import


For our example, I will search for the Jetta Rline and download the template using this product.

Product Import

Step 1

Download Excel Template with sample data or Download Existing Products into Excel Template

Sample Data



Sample Products
(Click to download file)

Export Products

Create Template by Exporting Products from Select Categories

 or

Create Template by Exporting All Products

 or

Search for products to export

Step 2

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Now, I will search for my car template, click on “Products listed above” option and then click the Button Export

Products

Select Language : English

Add New

Import Products

Import Product Translation

List Products: by using

Search

jetta

Choose Categories

Product Name

Part Number

Product Type

Category

Permission Group

Product User Interface

Active

Synced from Back Office

Alias of

System ID

Modif Date

Jetta RLine 2021

JRLINE-2021-10000

Vehicle

Sedan

Visible to everyone

Configurable Product

True

False

Jetta_RLine_2021_cpq

1/17/2 7:21:1

Number of items: 1

Items per page: 10

Product export / import

Export

products listed above

all products that match entered criteria

all products

Export as

Excel (2,000 rows per file)

CSV (100,000 rows per file)

Export products without attributes

Export

Product Translation Export

Export

products listed above

all products that match entered criteria

all products

Export

A CSV file will be download with the previous action using my product template

Salvamento Automático

Products_01-17-21_7-29-28 - Excel

Pesquisar

Claudio Goulart

Arquivo

Página Inicial

Inserir

Desenhar

Layout da Página

Fórmulas

Dados

Revisão

Exibir

Ajuda

SAP

Compartilhar

Comentários

Calibri

11

A

Quebrar Texto Automaticamente

Texto

Formatação Condicional

Formatar como Tabela

Estilos de Célula

Inserir

Excluir

Formatar

Classificar e Filtrar

Localizar e Selecionar

Área de Transfer...

Fonte

Alinhamento

Número

Células

Edição

C3

fx

ID	Product Name	Product System ID	Part Number	UPC MPN	Product Family Code	Description	Product Type	Price	Image	Alternative Text	Cost	Category	Rank	Weight	Start Date	End
271	Jetta RLine 2021	Jetta_RLine_2021_cpq	JRLINE-2021-10000			Jetta RLine 2021	Vehicle	0	JETTARLINE.jpg			Automotive>Sedan	10			

1.4. Preparing the file to upload the new Cars

Using this CSV file template, I will create 3 records in the CSV file.

- Mercedes
- BMW
- Ferrari

Important: Check the field “Image” out, I defined the same name of the column “Part Number”, with the extension “JPG”.

A4

fx

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	ID	Product Name	Product System ID	Part Number	UPC MPN	Product Family Code	Description	Product Type	Price	Image	Alternative Text	Cost	Category	Rank We
2		Mercedes	Mercedes_2021_cpq	MERCEDES-2021-60000			Mercedes 2021	Vehicle	0	MERCEDES-2021-60000.jpg			Automotive>Sedan	20
3		BMW	BMW_2021_cpq	BMW_2021-50000			BMW 2021	Vehicle	0	BMW_2021-50000.jpg			Automotive>Sedan	30
4		Ferrari	FERRARI_2021_cpq	FERRARI_2021-60000			FERRARI 2021	Vehicle	0	FERRARI_2021-60000.jpg			Automotive>Sedan	40
5														
6														

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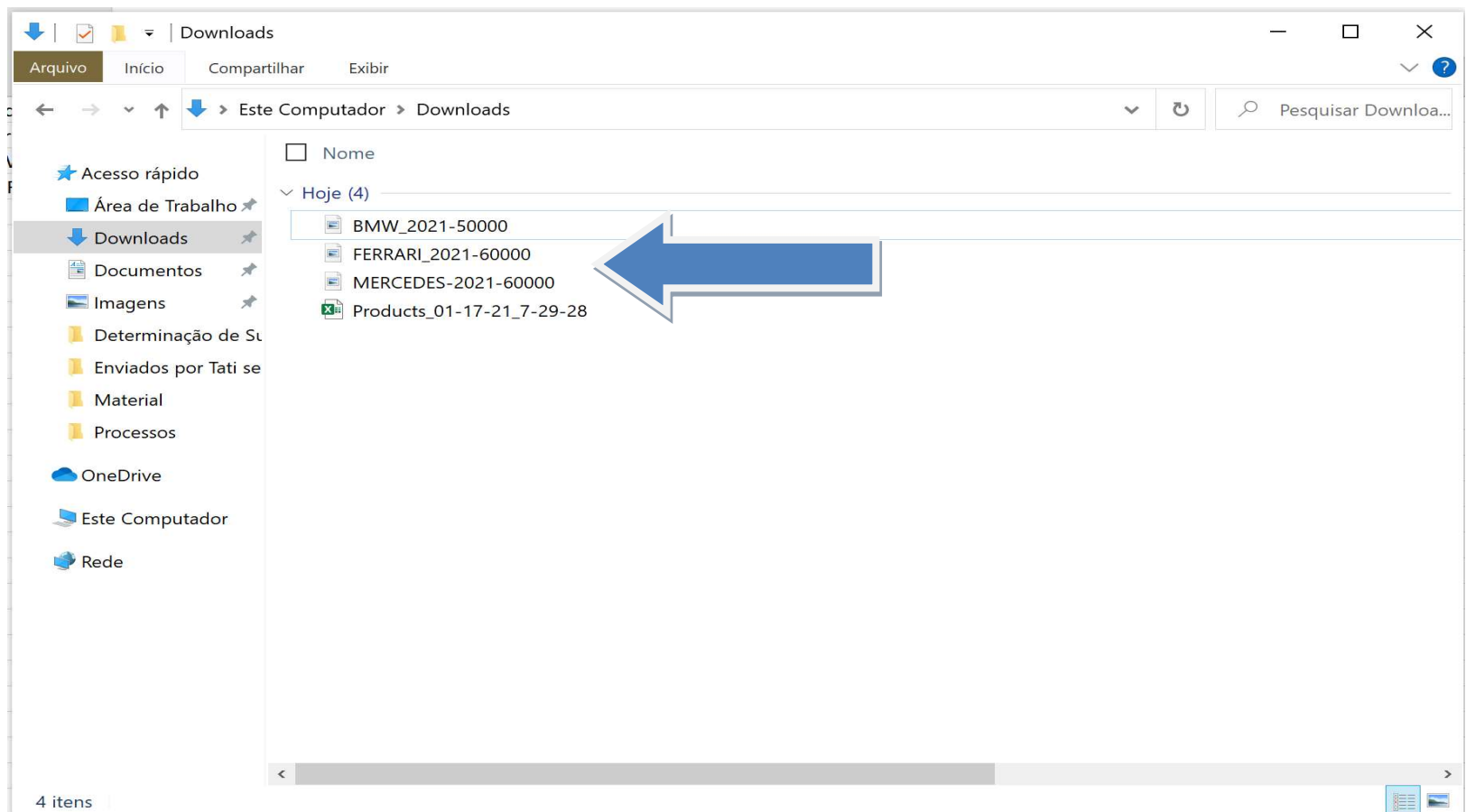
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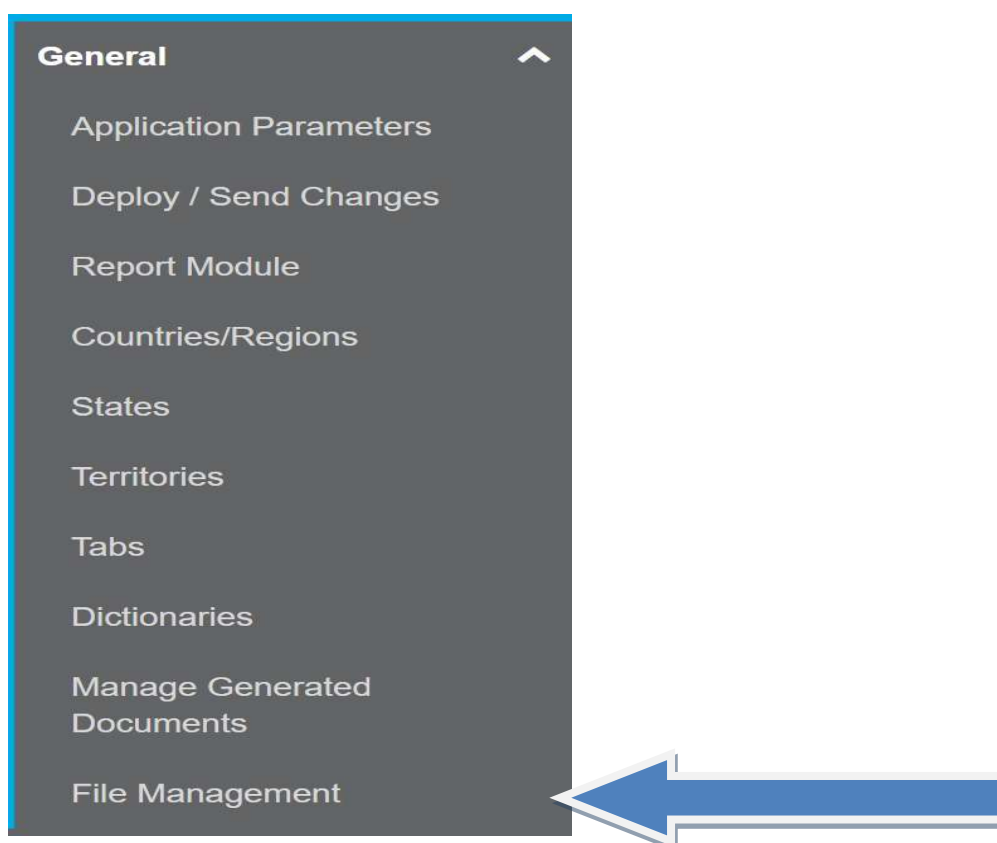
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1.5. Uploading the images of Cars

As mentioned, I have 3 cars, 3 images. Then I will upload those images using the standard functionality “File Management”.



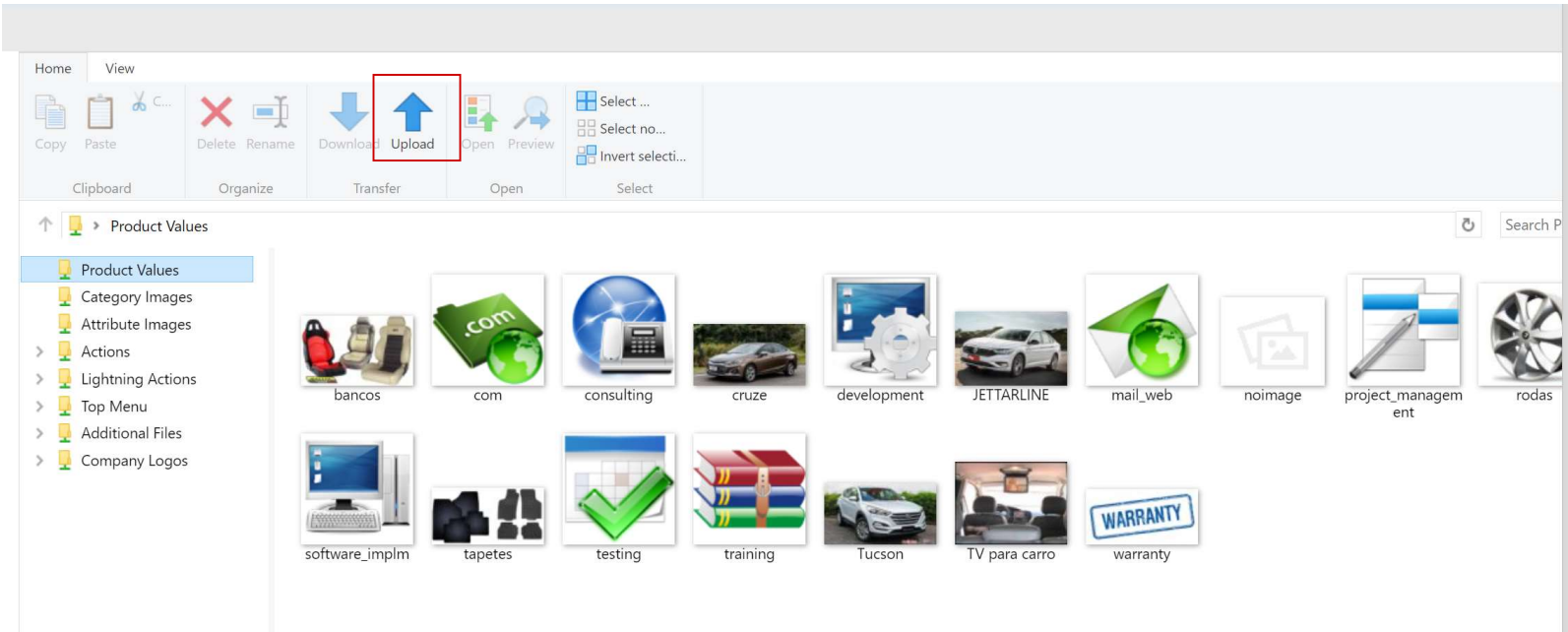
Click the link “General>File Management” to access the functionality “File Management”



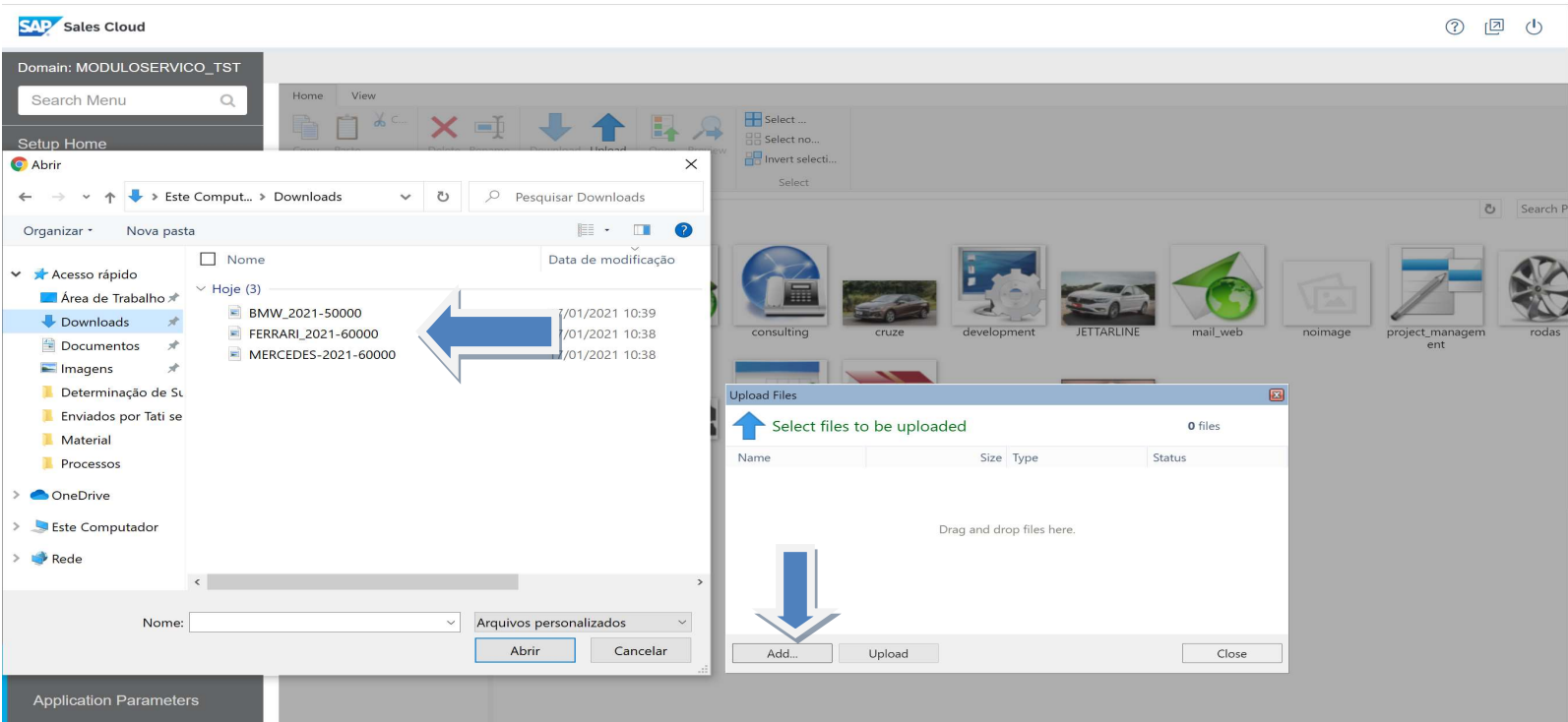
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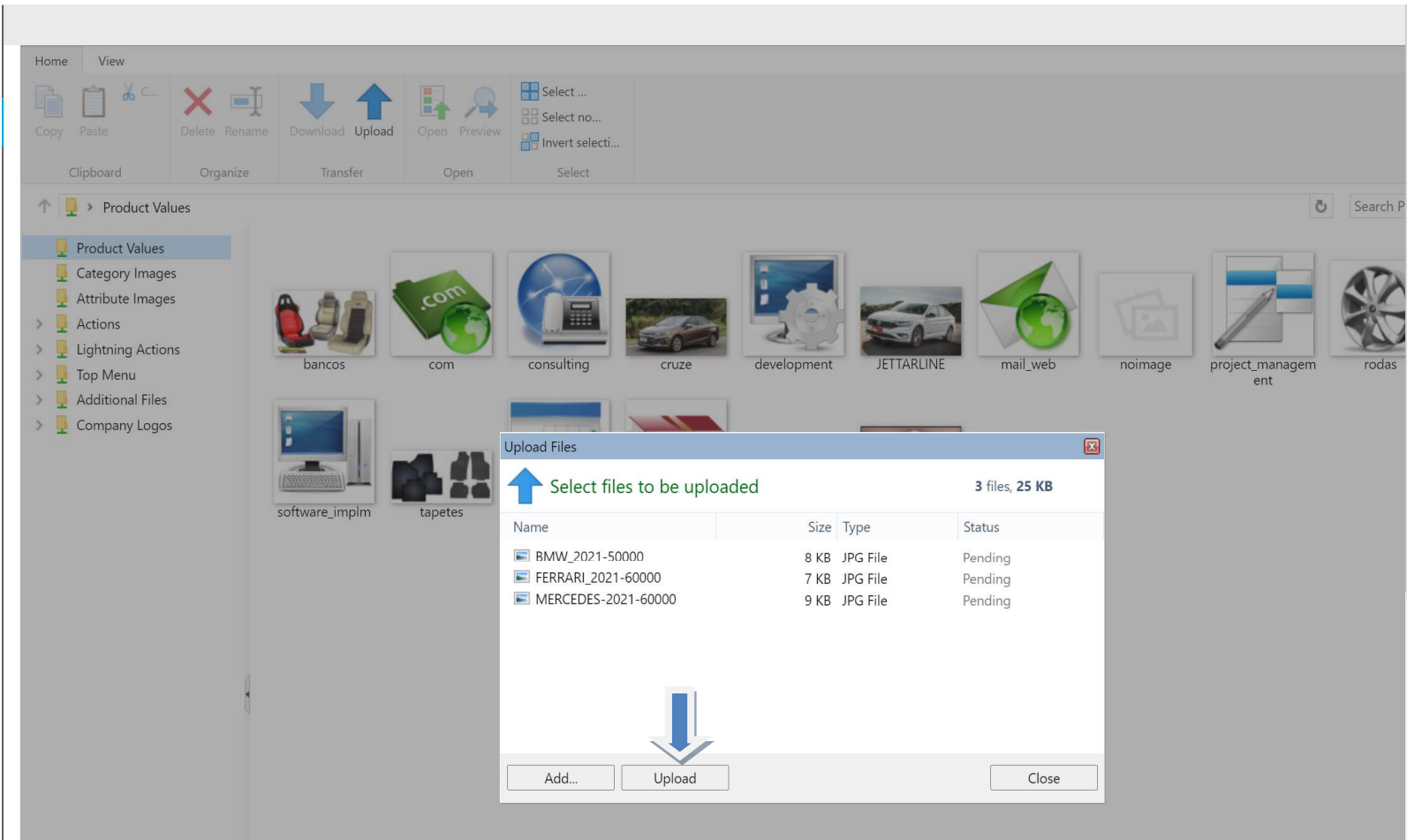
There are a lot of images, and tabs to organize those images. I will click in the button “Upload”



Then I will click the “Add” button, then check my Downloads. There will be 3 files representing each car. Please, Select the 3 files to upload.

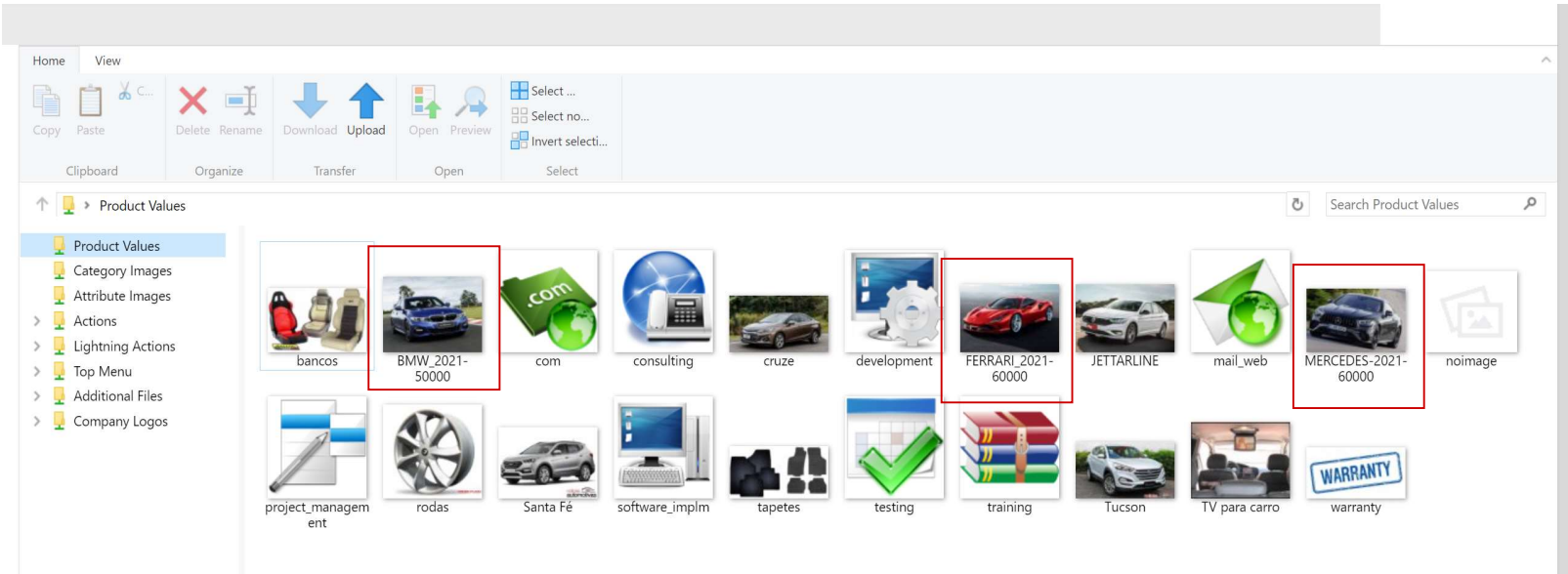


Click the button “Upload”



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Checking the images below, the cars BMW, Ferrari and Mercedes were uploaded to CPQ.



1.6. Importing the Products

Now, I will effectively import my new cars into the CPQ.

Product Import

Step 1

Download Excel Template with sample data or Download Existing Products into Excel Template

Sample Data

Sample Products
(Click to download file)

Export Products

Create Template by Exporting Products from Select Categories

 or

Create Template by Exporting All Products

 or

Search for products to export

Step 2

Populate template with your product data. During import, all products above the first empty row in the file are imported. After the empty row is found, all other rows under it are ignored.
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Step 3

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☐ Part Number

☐ Product Name

☐ External ID

☐ UPC (Universal Product Code)

☐ MPN (Manufacturer Part Number)

☒ CPQ ID

☐ Product Family Code

☐ None (product is always created)

Step 4

Select and Upload the file with your product data. File formats that you can upload are xlsx and xls. Cells with data type "date" are only supported for xlsx file format.

Escolher arquivo

Nenhum arquivo selecionado

Import

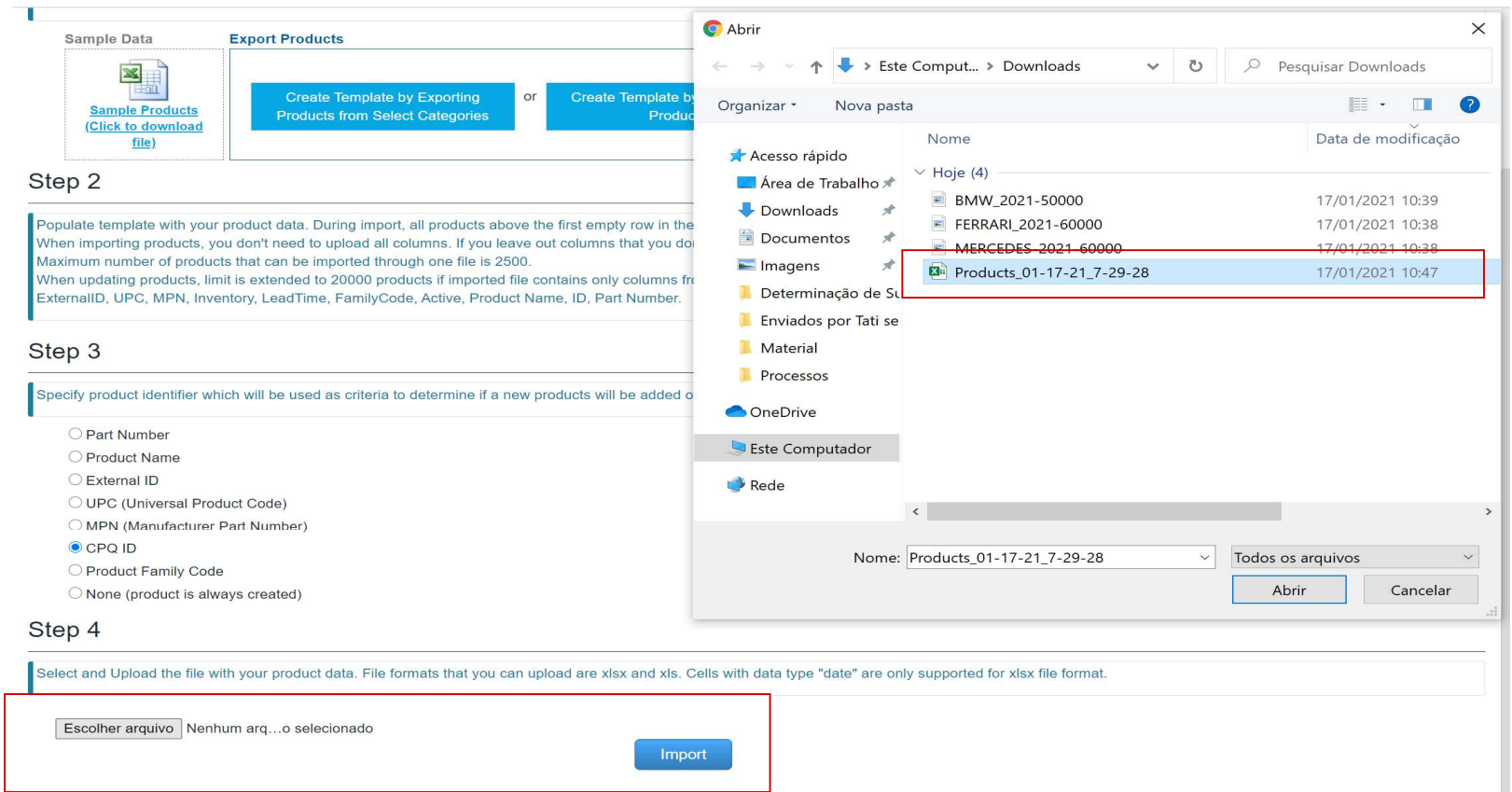
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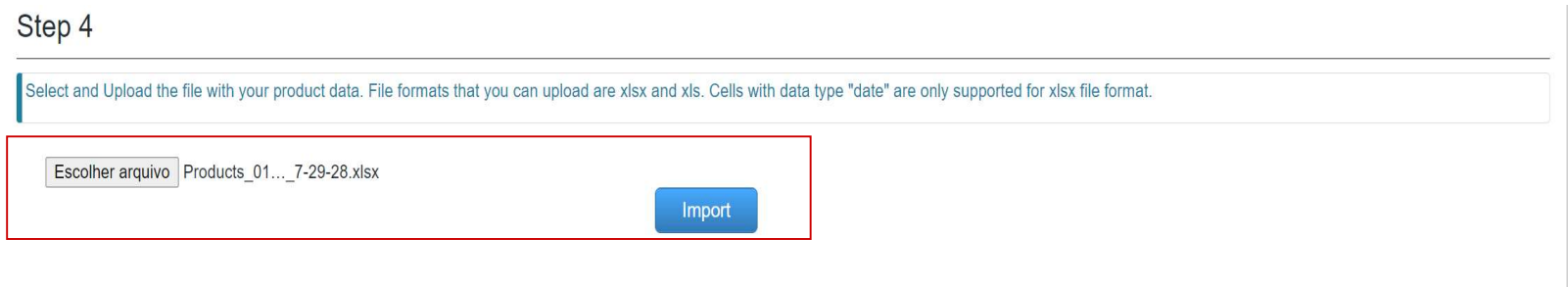
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Click the button “Choose file” and select the CSV file with our 3 new cars.

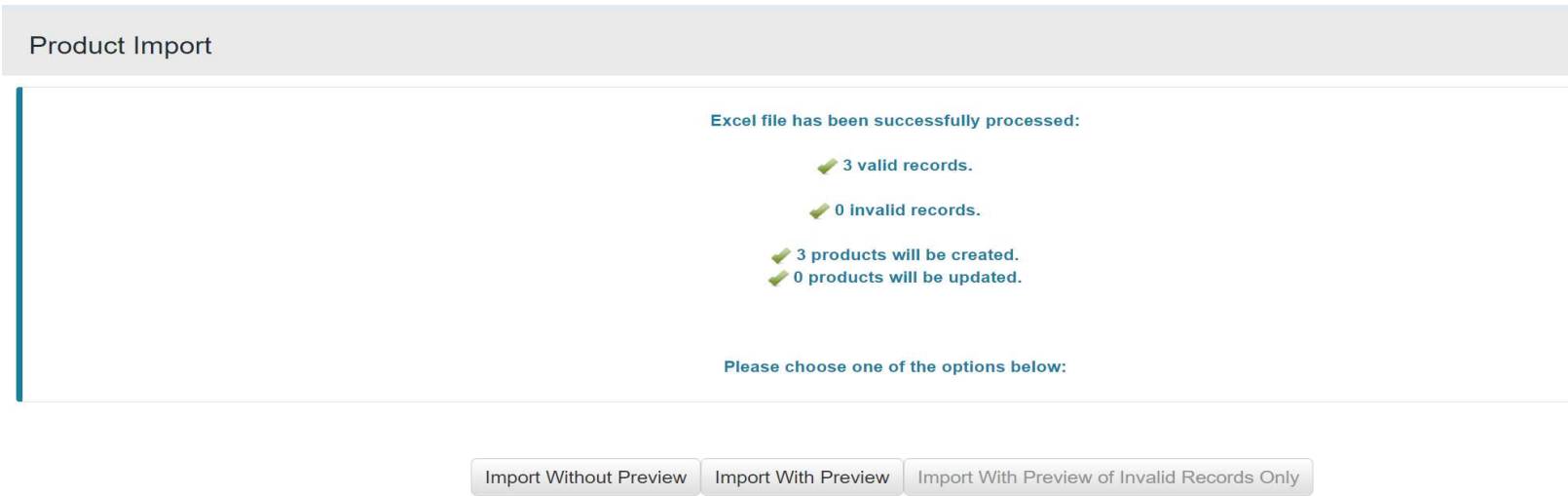


Now, click the button “Import”

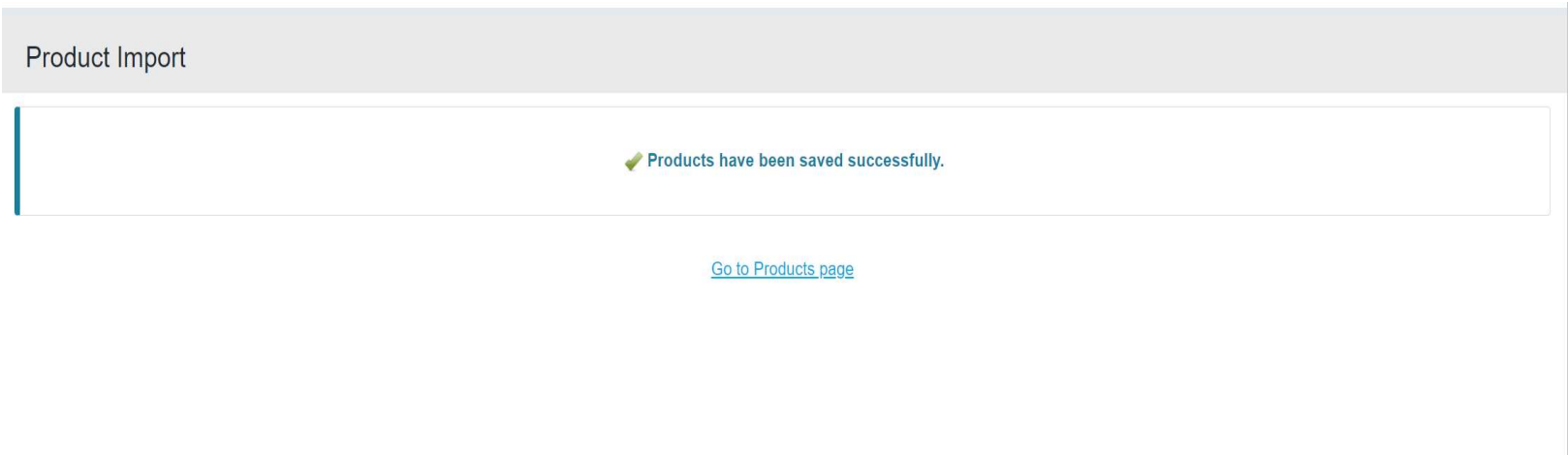


Now, CPQ check the file and the records that will be inserted in the system. Click the button “Import without preview”.

Important: Notice there are no errors or warnings about our file.



That’s it!!! Our products were inserted without errors.



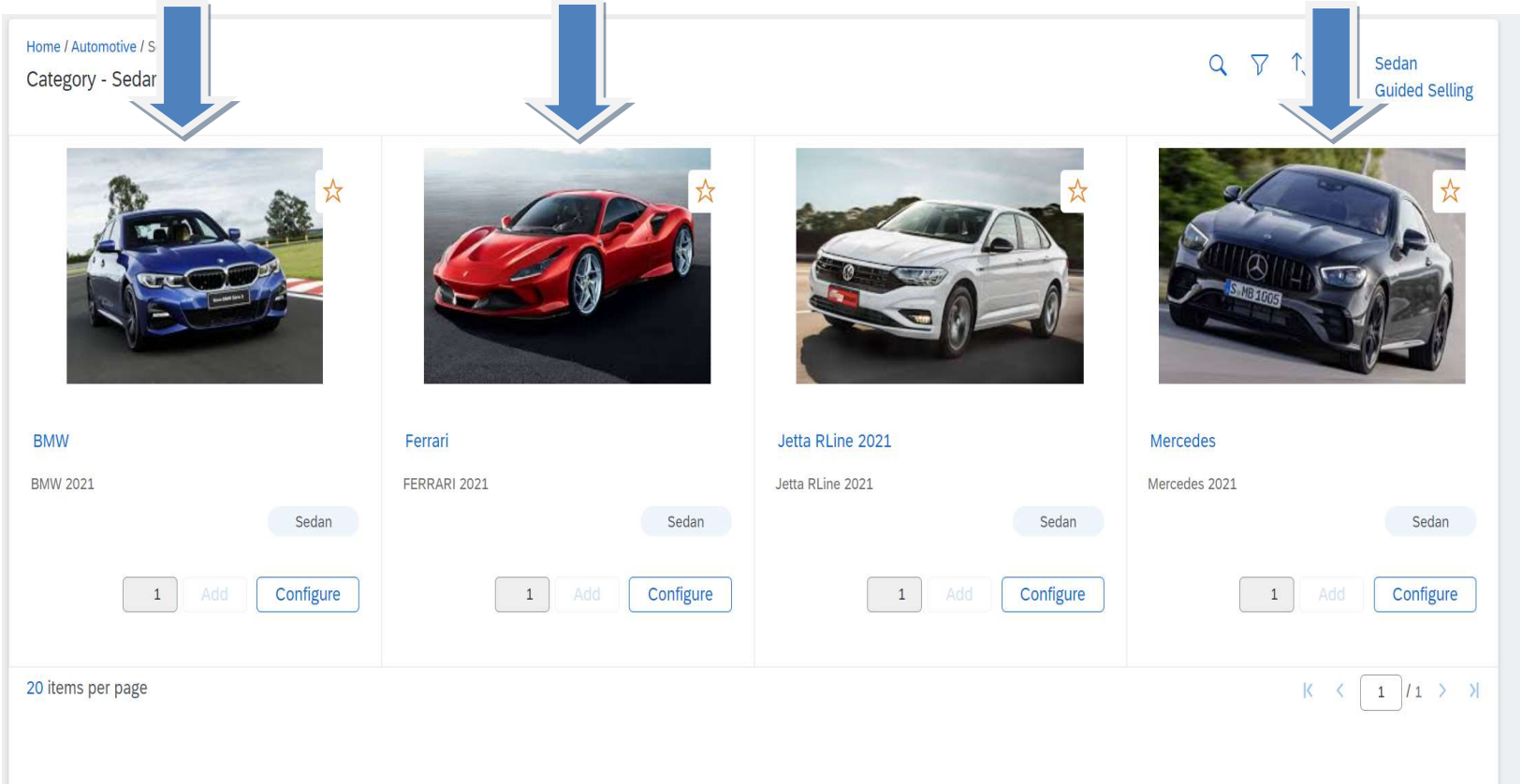
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1.7. Testing the new Products

Now, that's the moment!!

Our products were inserted into the CPQ database, and they are available to Quote with their images.

I hope you enjoyed that CPQ's functionality.



The fields Doors, Engine and SATNAV are available for each one.

