Configuration — Learning Path

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Learning Paths › Configuration

This learning path is for configuration administrators and operational leads who maintain company-wide application settings. You will learn how to establish the core organizational and inventory setup, tailor user-facing layouts and analytics, manage subscription-related configuration, and maintain advanced warehouse and feature settings using the Configuration app.

Learning objectives

- By the end of this path you can establish the company structures and reference values that support day-to-day operations.
- By the end of this path you can configure warehouse, item-category, and product-stage settings for inventory workflows.
- By the end of this path you can maintain layouts, dashboard settings, and report settings for different user needs.
- By the end of this path you can manage subscriber, plan, invoice, and reactivation-related configuration.
- By the end of this path you can review and update feature, serial-combination, and sales-order probability configuration.

Prerequisites

- Access to the Configuration app and permission to view and edit configuration records.
- Authority to make company-wide settings changes, or an approved change process for working with the responsible administrator.
- Familiarity with your organization’s departments, warehouse operations, product categorization, subscription offerings, and reporting needs.

- A clear understanding of the business requirement before changing a shared configuration record.

Module 1: Establish the operational foundation

Goal: Build the reference configuration that gives teams consistent organizational, product, and warehouse structures.

Lesson 1.1: Set up organizational and product reference structures

When your business needs consistent ways to organize teams and products, first maintain the shared department and item-category configuration. Start from Home, then use **Company Departments** to review or maintain the department structure used by the organization. Next, use Item Categories to maintain the categories that organize the company's items. Review the relevant configuration record before saving changes so that the new structure aligns with existing operational use.

Practice task: Review the department and item-category configuration and identify one structure that should be confirmed with the business owner before it is changed.

Lesson 1.2: Prepare warehouse operations for product movement

When inventory operations need a warehouse structure and defined handling stages, configure the warehouse before relying on it in operational processes. Open Warehouse to work with warehouse configuration, then review or update the associated Warehouse. Use Product Stage to maintain the stages that support the warehouse product workflow. Use Warehouse when the scenario requires adding a warehouse configuration rather than changing an existing one.

Practice task: Open the warehouse configuration and trace the review path from a warehouse setting to its product-stage configuration.

Module 2: Tailor the user experience and management insight

Goal: Configure layouts and analytics settings so users see relevant workspaces and decision-makers receive useful information.

Lesson 2.1: Maintain layouts for different user needs

When users need a consistent experience that matches their responsibilities, review the layouts assigned through Configuration rather than changing operational data.

Use Default Layouts to review the baseline layouts available to users. Then open Users Layouts and its related Users Layouts to maintain user-layout configuration. Confirm the intended user audience and business purpose before applying a layout-related change.

Practice task: Review the default-layout and user-layout screens and describe which configuration you would check first when a user's workspace needs to be standardized.

Lesson 2.2: Configure dashboards and reports for business review

When leaders need dashboards and reports aligned to current business priorities, use the dedicated settings areas to maintain those shared configurations. Open **Dashboard Settings** to work with dashboard settings, using **New Dashboard Settings** for a new configuration or **Configuration Record** to review an existing one. For reporting, use Reports Settings, Reports Settings, and the corresponding Reports Settings. Review the existing record before making a change that could affect shared reporting.

Practice task: Choose either a dashboard or report scenario and open the existing configuration record you would review before making an update.

Module 3: Configure subscription and commercial lifecycle settings

Goal: Maintain the settings that support subscription offerings, invoices, subscriber management, and commercial follow-up.

Lesson 3.1: Maintain plans, subscribers, and subscription invoices

When the organization updates its subscription offering or needs to manage a subscriber-related setup, begin by checking the plan configuration that underpins the offering. Use Plans and its Plans to review or update an existing plan configuration. Then use subscriber and Subscriber for subscriber configuration. Use Subscription Invoices and Subscription Invoices when the required change concerns subscription invoice configuration.

Practice task: For a request involving a changed subscription offering, identify the plan configuration you would review before reviewing subscriber or invoice settings.

Lesson 3.2: Support reactivation and sales-order probability decisions

When commercial teams need standardized reasons for reactivation or consistent sales-order likelihood settings, maintain these shared reference configurations. Open Reactivation Reasons to review or maintain the available reactivation reasons. Then use **Sales Order Chance** to review the configuration used for sales-order chance. Treat both areas as controlled business settings: validate the requested change with the commercial process owner before updating a shared value.

Practice task: Review the reactivation-reasons and sales-order-chance screens and decide which one applies to a request about returning customers.

Module 4: Govern advanced configuration and periodic changes

Goal: Safely maintain feature availability, serial combinations, and other high-impact configuration records.

Lesson 4.1: Review feature configuration before enabling operational changes

When a proposed process depends on a feature setting, review the current feature configuration before changing downstream settings or user workflows. Open Features, then inspect the related Features. Compare the requested business outcome with the existing record and follow the organization’s approval process before making changes. This approach helps avoid activating or altering shared capabilities without understanding their existing configuration.

Practice task: Open the feature configuration record and note the approval you would seek before changing a company-wide feature setting.

Lesson 4.2: Maintain serial combinations and periodic configuration records

When operations require serial-related setup or an administrator needs to validate an existing configuration record, use the dedicated serial-combination area and record view. Open Serial Combinations and review the associated Serial Combinations. For other periodic configuration review work, open the relevant Configuration record, such as **Configuration Record** or **Configuration Record**, and validate it against the approved business requirement before changing it.

Practice task: Open the serial-combinations record and document the business question you would resolve before modifying the configuration.

Final assessment

1. A company is opening a new operational location and needs its inventory workflow prepared before users begin working there. Which configuration areas should you review first, and in what order?
2. A user says their workspace should follow the organization's standard design, while another administrator says the issue may be specific to that user. Which screens would you use to investigate both possibilities?
3. The subscription team is changing an offering and wants to ensure related subscriber and invoice configuration remains aligned. What configuration should be reviewed first, and what should be reviewed next?
4. A commercial manager requests a new reason for customers returning to service and also asks to standardize how sales opportunity likelihood is represented. Which two configuration areas address these requests?
5. A process owner asks for a change that may depend on an application feature and may affect serial-related operations. What is the safe review sequence before making changes?

Answers

1. Review Warehouse or Warehouse first, then Product Stage. **Why:** Establish the warehouse configuration before validating the stages used in its product workflow.
2. Review Default Layouts and then Users Layouts. **Why:** Default layouts address the standard experience, while user layouts address user-specific layout configuration.
3. Review Plans first, then subscriber and Subscription Invoices. **Why:** The plan is the foundational offering configuration that related subscriber and invoice settings should support.
4. Use Reactivation Reasons and **Sales Order Chance. Why:** Each request concerns a different controlled commercial reference configuration.
5. Review Features and its Features first, then review Serial Combinations and its Serial Combinations. **Why:** Confirm feature configuration and approval before evaluating related serial-combination changes.