APTTUS®

Partner Commerce on Salesforce Winter 2019 User Guide

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About This Guide

With the Partner Commerce on Salesforce User Guide, you can find out how Apttus Partner Commerce works and how partners can quickly select products and checkout on behalf of the end customer, all the time having a seamless experience.

Topic	Description
What's Covered	This User Guide is designed to provide users with information on features and related user interactions to be consumed within Apttus Partner Commerce. This guide covers the most common use cases for users and assumes a level of familiarity with basic Salesforce.
Primary Audience	Partner users of an organization who want to place orders on behalf of end customers of the same organization
IT Environment	Refer to the latest Apttus Partner Commerce on Salesforce Release Notes for information on System Requirements and Supported Platforms.
Other Resources	• Partner Commerce Implementation and Deployment Guide: Refer to this guide for installing, implementing and deployment of the Apttus Partner Commerce solution. • Partner Commerce SDK: Refer to this guide for technical instructions on the installation and setup of an Apttus E-Commerce storefront.

This guide describes the following tasks:

- General Administration
- Selecting Account for which the order is to be placed
- Browsing Catalog
- Managing Assets
- Product Configuration
- Applying Promotions
- Managing and checking out the cart
- Creating the draft order
- Generating the draft order document and presenting the same to the end customer
- Confirming the order

What's New

The following table lists changes in the documentation to support each release.

Release	Topic	Description
Winter 2019 Rev B	Product Configuration	Modified topic. Added information for enhancements introduced in Winter 2019 Patch 5.
Winter 2019 Rev A	Product Configuration	Modified topic. Added information for supported capabilities.
	About Apttus Partner Commerce	Updated topic to conform with Apttus Documentation standards.
Winter 2019	All topics	Complete new guide.

About Apttus Partner Commerce

Partner Commerce is the activity of electronically managing and improving channel sales online or over the Internet. Partner commerce has three main components: Web Commerce, Mobile Commerce, and Social Commerce, thus connecting channels and devices.

As an administrator, you can use Apttus CPQ to perform configuration and pricing tasks to build the catalog page for your Partner Commerce web site. Configuration involves creating products, options, attributes, categories and associating them appropriately with each other for visibility on the Catalog page. A product can be created as a standalone product or as a bundle product with options and attributes. You can control the selection of a product on the catalog page by configuring constraint rules. You can also control the selection of attributes on the configuration page of a product by setting up attribute-based configuration for that product. Pricing enables you to set up pricing structures for the products so that the price for all products is calculated accurately. Pricing has two components: Price Lists and Price List Items. A price list controls the visibility of products to the user. A price list contains several price list items, each linked to a product. Apttus CPQ calculates the price for each product based on the applied price list, price list items, and various pricing and discounting rules.

After you have used Apttus CPQ to configure products and pricing, you can associate the price list to the storefront object within the Apttus E-Commerce package. After your catalog has been set up, the next step is to create a Storefront record.

You can define the asset management functions with different data objects to track quote details until an order is fulfilled. You can set up multi-language web sites. You can apply promotions, make secure payments, and calculate tax on your cart page.

Apttus Partner Commerce allows a partner-user to perform the following tasks:

- General Administration
    - Assign permission sets for user access
    - Set up Master Data
- Browse the product catalog
- Search products and view product details
- Add products to the cart
- Manage assets
- Manage orders
- Configure products with options and attributes
- Apply promotions on the products in the shopping cart
- Manage cart
    - Request a quote
    - Manage payments
    - View tax details
    - Working with multi-language storefront
    - Checkout of the cart
- Manage product configuration rules - Constraint Rules and Attribute-based configuration rules

> ⚠ The product configuration rules are not in complete parity with Apttus CPQ at present. Refer to Product Configuration for supported capabilities in Apttus Partner Commerce.

The differences in feature and capability support in Partner Commerce in comparison with Apttus CPQ are listed below:

- For Product Attribute Rules, the scope must be Product and Product Family. The permitted values for Partner Commerce are:
  - Allow
  - Default
  - Hidden
  - Disabled
  - Required
  - Reset
- For Attribute Value Matrix, the scope must be Product and Product Family. The permitted values for Partner Commerce are:
  - Default
  - Constraint
  - Force Set
- Options Configuration - The minimum and maximum options configuration works at all levels of option groups. In Partner Commerce, only three levels are supported. Also, the minimum and maximum product quantity and total quantity validation works for all levels of option groups.
- Constraint Rules - Constraint Rules are supported for standalone, bundle and option products for basic inclusion, exclusion, and recommendation type rules.
  - On the Product Level, all the rules are applied only when you have selected the Match in Primary checkbox.
  - On the Product Option Level, all the rules are applied only when you have selected the Match in Options checkbox and a combination of the Match in Primary and Match in Options checkboxes.

- Creating the draft order
- Generating the draft order document and presenting the same to the end customer
- Confirming the order

Key Terminologies

It is important to understand how terms are used when working with Apttus Partner Commerce.

Term	Description
Configure Price Quote (CPQ)	Apttus solution for configuring products, setting up pricing, and generating quotes. For Partner Commerce, CPQ is a pre-requisite for master data setup.
Partner Commerce	Partner Commerce enables your partner company to create quotes, configure products, and manage orders for the end customer to ensure faster selling and up-time without your support.
Product Catalog	A view that allows hierarchical categorization of products for users to search through and add to their configuration.
Products	Products or services that can be sold on its own as a standalone item, an option of other products, or as part of a bundled product.
Assets	Assets define a purchased product or service. An asset is associated with an account. After being processed and fulfilled, new quotes and orders result in new assets, which are listed on a customer's account and a line item from an asset becomes an Installed Product.
Constraint Rules	Rules that drive automatic inclusion, exclusion, recommendation or replacement of products selected in the catalog page. Each Constraint Rule is composed of three parts: the Rule Detail, the Rule Condition, and the Rule Actions.
Promotions	A promotion is a marketing technique that you apply to reduce the list price of a product or a service. You can create a promotion and restrict the scope, limit, and benefits so your sales representatives apply this promotion to specific products, for specific customers, and for a limited period.
Options	A product that can be sold along with another product.
Attributes	Features of a product, such as color, size, weight, and more.
Quote	A structured definition of a prospective sale that contains product configurations, pricing, and customer opportunity information.

Logging Into Partner Commerce

You must login to use partner Commerce. Every partner is provided with a unique Partner Commerce URL. Without logging in you cannot see the Partner Commerce self-service portal.

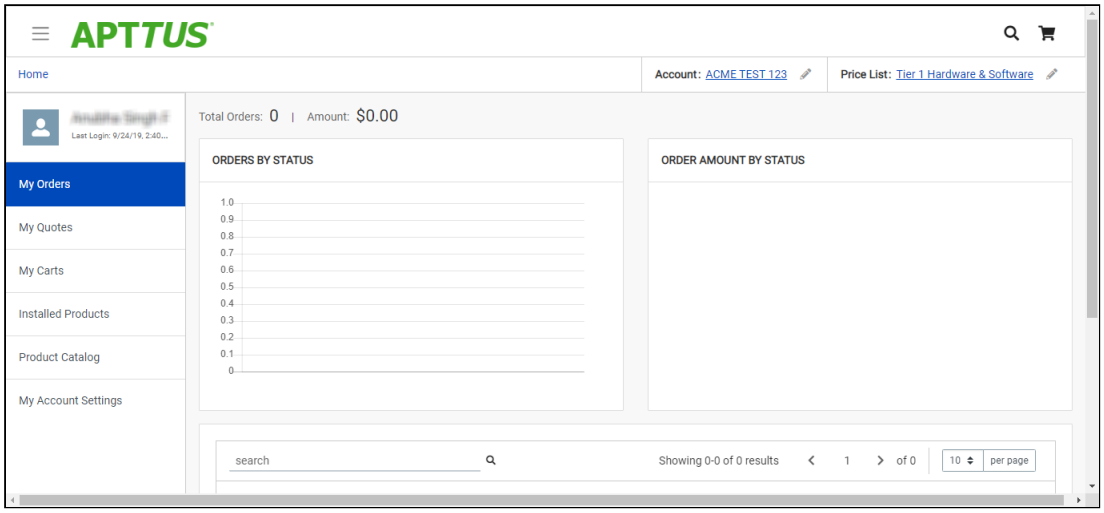
Prerequisites

- You must be a valid Salesforce user.

To log in to Partner Commerce

1. Open the URL in your system's browser.
2. Enter your username and password and click Login.

On successful authentication, if you are a licensed user, you are redirected to the Partner Commerce portal's home page.



To retrieve a forgotten password

1. If you've forgotten your password click **Forgot Password?** link.
2. Enter your username to receive the password reset link and click **Submit**.
3. You will receive the password reset link on your registered email address. Open the email and click the reset link.
4. Enter the new password and enter the password again to confirm and click **Submit**.

Your password is reset and you can log in with the new password.

To log out from Partner Commerce

1. From the Partner Commerce home page click the menu icon from the upper left-hand side of the page.
2. From the left-hand side navigation panel click Log Out Log Out.

General Administration

As an administrator, you must complete the following for your storefront to work for your customers.

1. Community Setup
2. Users and Permission Sets
3. Adding a Storefront record
4. Master Data Setup

Permission Sets and User Access

The E-Commerce package comes with basic permission set for providing the necessary access to users. The permission set is named 'Apttus Ecommerce' and should be assigned to users to access the e-commerce storefront. If you would like to make any changes to the permissions, you may clone the permission set and make any changes necessary.

Granting User Access to Your Storefront via Profiles

You can enable users to access your storefront via community through profiles based on the level of access you want to grant.

To enable users to access your storefront

1. Go to **Setup > Customize > Communities** and click **All Communities**.
2. Click **Workspaces** and under My Workspaces, click **Administration** and select **Members.**
3. Under Select Profiles section, from Available Profiles column, select *High Volume Customer Portal User* and add it to the Selected Profiles column.
4. Under the Select Permission Sets section, from Available Permission Sets column, select *Apttus Ecommerce* and add it to the Selected Permission Sets column.
5. Click **Save**.

Master Data Setup

To display products and pricing associated with it in your storefront, you must set up master data in CPQ.

- Product - Define Standalone, Bundle and Option products.
- Pricing - Define Simple Pricing, Price Rulesets, Price Matrix (Attributes / Quantity).

For details, refer to Product Management and Pricing sections *in the CPQ on Salesforce Administrator Guide*.

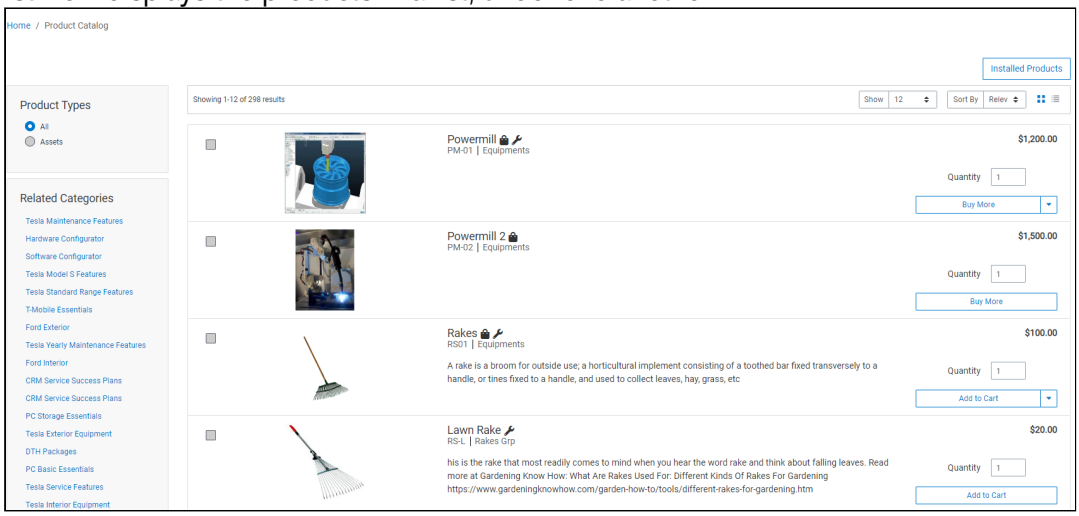
Browsing the Product Catalog

Product Catalog is a detailed list of the inventory of a store. You can view the products that your vendor supplies on the Catalog. The product catalog page displays the products available for purchase and also display their details like the product's name, price, specification. You can also add products to the cart from the catalog page. The product page has many features to make the searching and selecting products easy for the users.

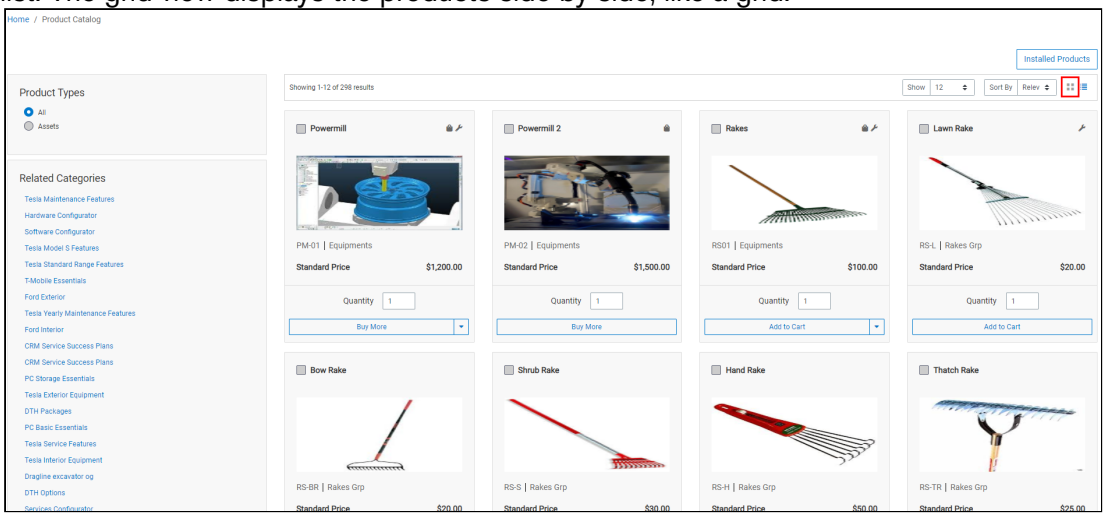
View Options

On the catalog page, you can view products in different ways. The bar on top of the catalog has two different view options:

- **List View**: To select the list view, click the list view icon from the bar above the product list. The list view displays the products in a list, under one another.



- **Grid View**: To select the grid view, click the grid view icon from the bar above the product list. The grid view displays the products side-by-side, like a grid.



Filtering Products in the Catalog

The catalog page can show the entire inventory, therefore, to find the right product you can use filters available on the catalog page. The following section describes the filters available on the catalog page of Partner Commerce.

- **Product Type**: You can filter the products according to the type of the product. You can choose from:
    - All: Choosing this option, displays all the products available in the store for purchase.
    - Assets: Choosing this option, displays the products that you have already purchased and that are your assets now.
- **Category Filtering:** Using the category hierarchy you can navigate to products through the list of related categories and their subcategories. The subcategories list is displayed only after you select a category. You can go to the Product Types section and select **All** to view all the categories available.
- **Product Family Filtering** - You can filter the products in the catalog by the product family that they belong to. In the product family field, use the type-ahead search to search and select the product families for filtering. You can choose multiple product families from the picklist.

Actions on the Product Catalog Page

- **Sorting:** You can sort the products in the product catalog page by choosing **Sort By.** You can sort the product according to **Name** or **Relevance.**
- **Pagination**: You can set how many products to see on a single page in the product catalog. To set pagination, go to **Show** field on the top bar and select the value from, *4, 12, 20,* and *50* products on one page.

- **Viewing product details**: To view the details of any product, like its description, configurations, specifications, features or price, click the product's name or its image.
- **Adding a product to the cart:** You can click Add to Cart to add a product to your cart for purchasing. You can also specify the quantity in the Quantity field before adding the product to the cart.
- **Asset-based Ordering Actions**: If the product is an asset, or you have already purchased it, you will see the following asset-based ordering actions:
    - **Buy More:** Adds the products to the cart.
    - **Terminate**: Terminates the asset.
    - **Change Configuration**: Lets you change the configuration of an already purchased asset.
- **Product Images** - While viewing product details, you can view product images and collateral under the Attachments tab.
- **Product Features** - You can view product features under the Specifications tab.

Searching for Products

The Search icon on the Catalog page header allows you to quickly search and choose the product you are looking for.

There are two ways you can search for a product.

- Click the **Search** icon and use the text search to search and select a product.
- Click the **Search** icon and enter a few keywords and hit Enter on your keyboard. A list of products is displayed matching the keywords you entered.

You can select a product from the search results and click **Add to Cart** to add the product to the cart. If a product is configurable, you can configure a product with multiple options or attributes and then add the product configuration to the cart.

Viewing the Product Details

The Product Detail page outlines the product attributes and options that you can add to the product. From this page you can configure your product.

- Access Product Details from Catalog, Cart, and Product Recommendation
- View Product Features
- View Product Attachments and Collateral from Product Details
- View Attributes for Standalone Products with Default Selection
- View Bundle Options for Bundle Product with Default Selection
- View Selected Attributes for Products in Cart
- View Selected Options for Products in Cart
- View Product Images
- View Price Summary for Selected Options

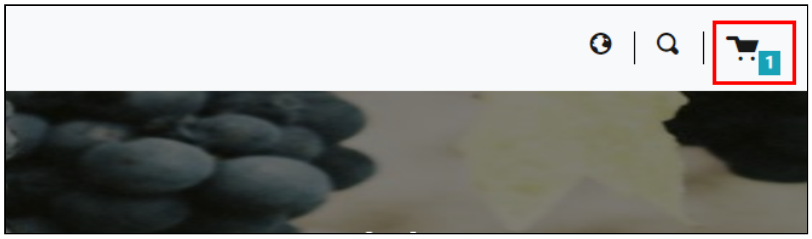
Adding Products to a Cart

While navigating the catalog, you may decide to purchase one or more products. You can add those products to the cart and revisit the cart later to see all your cart items.

To add a product to the cart

- On the catalog page, click the **Add to Cart** button for the product you want to purchase. You can choose as many products to be added to the cart.
  - OR -
- From any product detail page, click **Add To Cart**.

The product is added to the cart and you can view the complete list of products in the mini cart by clicking the cart icon on the top right. If you have products selected, this icon displays the number of products added.



Accounts

The Accounts section contains all the information of a customer or partner account on the Partner Commerce portal. You can access your account after signing in with your Partner Commerce credentials. To open your account details, from the left-hand navigation, click **My Account**. The My Account home page has the following tabs in the left-hand navigation:

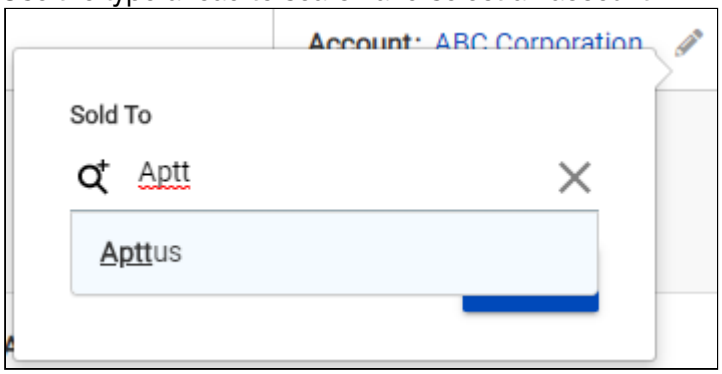
- My Orders: This dashboard displays graphical information for Order by Status and Order Amount by Status.
- My Carts: Displays multiple in-progress carts with their status details. The primary cart has **Is Active** column selected. You can also delete a cart from this page.
- Installed Products: Displays the list of installed products or assets. You can select an asset and Renew or Terminate it.
- Product Catalog: Takes you to the product catalog page with the listing of all products.
- My Account Settings: Enables you to:
    - View or edit user information
    - View or edit account information
    - Change your password

Changing the Account

As a partner, you work with multiple customers and therefore, multiple accounts. From the top navigation bar, you can change the account you are working with. The My Account page shows the information for Orders based on the account selected by you. When you log in to Partner Commerce, you will see the account details pertaining to the account linked with your contact.

To change the account

1. From the top navigation bar, go to the Account Field.
2. Click the edit icon .
3. Use the type-ahead to search and select an account.



4. Click **Update** to finish account change.

Orders

You can see the order details of your orders after logging into Partner Commerce. The Orders home page or **My Orders** page lists all the orders that you are working with for the selected account. The orders list shows the orders with the following details:

- Name
- Price List
- Bill To account
- Ship To account
- Order Amount
- Order creation date
- Order renewal date

Search

Showing 1-4 of 4 results 1 of 1 10 per page

Order Number	Title	Status	Price List	Bill To	Ship To	Order Amount	Created Date	Re
O-00002856	TechPubs Order 1	Pending	Tier 1 Hardware & Software	ABC Corporation	ABC Corporation	$1,899.46	10/24/19, 11:30 PM	
O-00002857	n/a	Pending	Tier 1 Hardware & Software	Apttus	K-Club	$11,016.00	10/24/19, 11:56 PM	
O-00002614	TechPubs Computers Order	Pending	Tier 1 Hardware & Software	ABC Corporation	ABC Corporation	$626.00	9/24/19, 5:02 PM	
O-00002613	TechPubs Hardware Order	Draft	Tier 1 Hardware & Software	ABC Corporation	ABC Corporation	$3,870.00	9/24/19, 4:59 PM	

From the My Orders page, you can:

- Select and view the details of an order
- Search an order
- View the price list and bill to and ship to account of the order

To filter order in the orders list

1. Go to My Orders page.
2. From the search bar in the type, type and search for the order using the order name.

You will see a list of the filtered orders.

Viewing Order Details

The order details page displays the order status and the actions you can take based on each status, as described in the table below:

Order Status	Actions
Draft	Confirm, Generate

Order Status	Actions
Generated	Confirm, Present Order
Presented	Confirm
Pending, In Fulfillment - Not Paid	Make Payment
Pending, In Fulfillment - Paid	N/A
In Amendment	Discard Changes Confirm Changes

As a Partner Sales Representative or Order Desk User, you can create an order on behalf of a customer to help them in ordering products or services. You can create an order from the catalog page.

To create an order

1. From the home page, click **Product Catalog** in the left-hand navigation pane.
2. From the product catalog, select products, specify their quantity and click **Add to Cart**.
3. Click the cart icon in the top-right corner of the catalog page and click **View cart**.
4. From the cart page, click **Create Order**. This opens the Create Order form.
5. The create order pane shows an order with default values in the following fields:

Field Name	Description
Primary Contact	Shows the name of the primary contact of the logged-in partner. You can search and select another value to update this field.
Bill To	Shows the Bill To the location of the account associated with the primary contact. You can search and select another value to update this field.
Ship To	Shows the Ship To the location of the account associated with the primary contact. You can search and select another value to update this field.
Price List	Shows the name of the price list associated with the account selected. You cannot edit this field. If no value is present, this field shows the Default Storefront price list.
Sold To	Shows the name of the account associated with the primary contact. You cannot edit this field.
Order Name	Enter the name of the order. By default, this field is blank. This field is not mandatory.

6. Click **Create Order**.

You will see a success confirmation box. To see more information about the order click **View Your Order**. This opens the Order details page.

To view an order

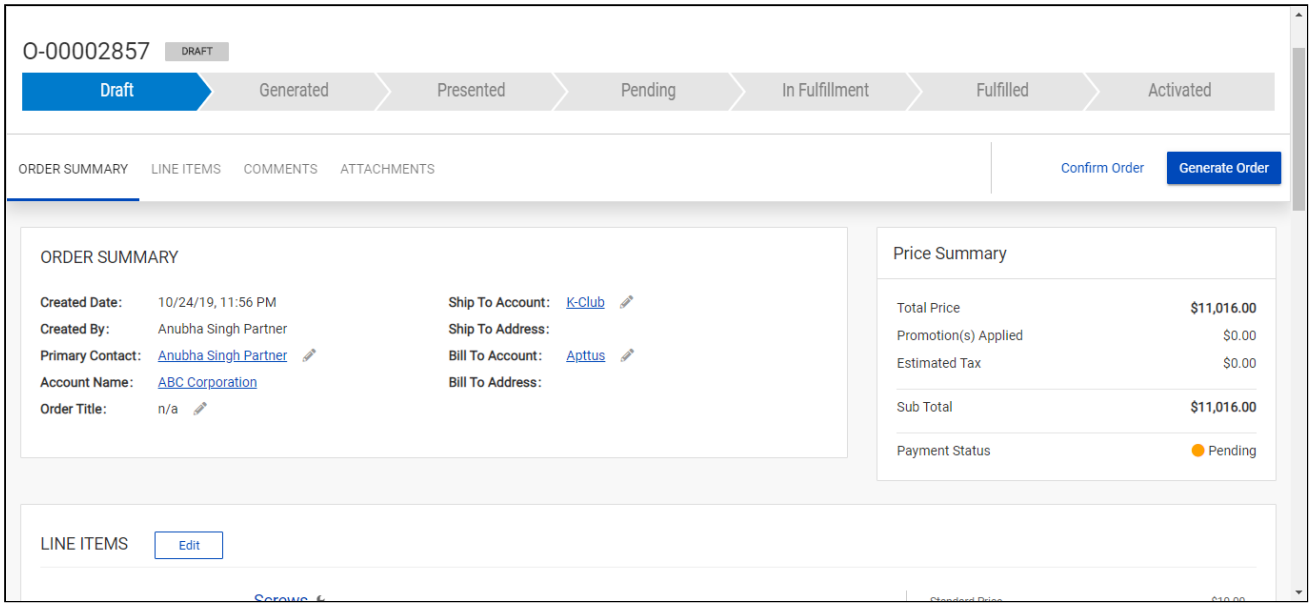
1. Log in to the Partner Commerce portal.
2. From the left-hand navigation, click **My Orders**.
3. From the orders list click the **Order Number** link to view the details of the order.

The order details page shows the order information arranged in the following tabs:

- Order Summary
- Line Items
- Comments
- Attachments

The order details page also has a progress bar on the top of the page. This progress bar shows the current phase of the order based on the order status. The phases of the progress bar are color coded. The color and their status are described as follows:

- Blue color shows that the phase is incomplete.
- Green color shows that the phase is completed.
- Grey color shows that is phase has not yet started and is upcoming.



To generate an order

1. From the order details page, click **Generate Order**.
2. In the Generate Order dialog box, select the Template from the drop-down list.
3. Select the Output File Format of the order document from the drop-down list. You can choose either PDF or DOC.

4. Click **Generate**.

This generates an order document and sends an order generation notification email to the associated partner and customer. You will also see a notification in the Order Details page. You can also see the generated order document in the Attachments tab of the details page.

Presenting Orders

After generating an order you must present it to your customers.

To present an order

1. From the order details page, click **Present Order**.
2. In the Present Order dialog box, the Send Order To field is already populated with the email address of the primary contact. This field is not editable.
3. Enter the email addresses of the customers to be copied in the Cc field.
4. Click **Present**.

The order is sent to the customer and they receive an email notification. The order status changes from Generated to Presented.

> ⓘ If you confirm an order right after drafting it, the document is automatically generated and present and directly reaches the Pending state.

Confirming Orders

As a partner, when a customer places an order or you place an order on behalf of a customer, you must confirm it to sync it with the cart and create the order line items. You can confirm an order which is in any of these three states: *Draft, Generated* and *Presented*.

To confirm an order

1. From the order details page, click **Confirm Order**.

On confirmation, the order status changes from Draft to Pending. When an order is confirmed it is automatically generated and presented. After confirmation is complete, the customer also receives an email notification.

Making Payment for an Order

After presenting an order to a customer, you can confirm the order. Without confirming the order you cannot make payment for that order.

Prerequisite:

- The order must be confirmed and its status must be *Pending*.

To make payment for an order

1. From the order details page, click **Make Payment**.
2. In the Make Payment dialog box, select the mode of order. You can choose from the following options:
    - Invoice Me Later: Choose this option to generate an invoice later.
    - PO Number: If you choose this option, you must enter the purchase order number in the PO Number field and click submit.
    - Pay Now: Choose this option to pay using a credit card or debit card. You can see a list of your saved card details. You can select any existing cards and pay or you can add a new card.
        - To add a new card click **Use new credit/debit card** and add the card details
        - After adding the card details if you want to save the card for future transactions, click **Save this card information for future payment**.
3. Click **Submit**.

After the payment is completed, the Payment Status on the order details page changes from *Pending* to *Processed*.

Assets

Pre-requisite:

- Ensure that Enable ABO is set to true in the Storefront record to use a standard template.
- Asset Actions is set for Buy More, Change Configuration, Renew, or Terminate actions on the storefront object. This field is dependent on the Enable ABO flag.

As a Customer Service and Sales Representatives in your organization, you can Renew and Terminate a customer's assets. You may even choose to Buy More for an existing asset. You can also change the configuration for an existing bundle subscription during renewal or mid-term assets from the cart.

Assets are the products or services that you have bought. You may need to modify the products that you have bought in terms of Quantity, Selling Term, or Duration. You can access all the products that you have bought from the Assets tab.

- Asset Filtering on the Catalog page
- View Installed Products for Account
- Enable or Disable ABO on Partner Commerce Template
- Enable or Disable Renew or Terminate actions on Partner Commerce Template

Renewing an Asset

- Renew for a Standalone or a Bundle Asset from the Catalog page (Catalog and Recommendation)
- Renew for a Standalone or a Bundle Asset from the Installed Product page
- Mass Renewal for Standalone or Bundle Assets

Terminating an Asset

- Terminate for a Standalone or a Bundle Asset from the Catalog page (Catalog and Recommendation)
- Terminate for a Standalone or a Bundle Asset from the Installed Product page
- Mass Terminate for Standalone or Bundle Assets

Buy More Subscription (Increment Asset)

- Buy More for a Standalone Asset from the Catalog page (Catalog and Recommendation)
- Buy More for a Standalone Asset from the List View Catalog
- Buy More for a Standalone Asset from the Installed Products page

Changing the Configuration for an Existing Asset

You can change the configuration for an existing bundle subscription during renewal or mid-term assets from the cart. You can change the configuration for Recurring Asset products (Bundles) and Usage Standalone Asset products from the cart with "Amended" status.

- Overall status for the primary bundle or standalone product is "Amended"
- One Time options cannot be changed and the Line Status = "Existing"
- Recurring options and Usage Standalone assets are editable and can be changed for: Quantity, Switch Options, Select Additional Options, Attributes
- When you change the Quantity or Attributes for an option, the Line Status = "Amended"
- When you change an option, existing option Line Status = "Cancelled" and new selected option Line Status = "New". The Cart displays both the options with Line Status = "Cancelled" and "New" with the newly selected option within the option group.
- When you select a new option without switching an existing option, the newly selected option is displayed in the Cart with Line Status = "New"

Product Configuration

If you have attributes or options associated with your products, you can configure them from the Catalog page. You can perform one or more of the following:

- Configure Standalone products with Attributes
- Configure Single Level Bundle
- View Selected Configuration
- Edit Configuration
- View & Select Options
- Minimum and Maximum validation of Options for Option Groups
- Minimum and Maximum validation of Product Quantity
- Configure Nested Bundles
- Add Default Configuration from Catalog
- Option Level Attribute Configuration
- Attribute-Based Configuration Rules
- Hide Option Groups and Options - You can completely hide an option group and its options within it from the user interface.
    - Select the **Is Hidden** flag from the Option Group Configuration page to hide option groups.
    - Use the exclusion type constraint rules to hide excluded options from the list. You must set up the Action Intent as Hide in the Constraint Rule Action.
- Modify Option Groups and Options Within a Bundle Configuration - In a Bundle configuration, from the Option Group configuration, you can now select **Modifiable Type** setting with values Fixed and Variable.
    - Selecting Variable enables you to change the quantity of the option products while configuring the product.
    - Selecting Fixed restricts you from changing the quantity of the option products inside the parent option group.
    - Setting the modifiable type setting to Fixed or Variable impacts only on immediate options. There is no impact on the sub option groups. This setting has to be done on each level. This also overrides minimum and maximum validation. In case you select an option group with Modifiable Type as Fixed, the quantity input box of immediate option(s) is disabled. The quantity displayed is the default value and in case you do not set the default value, the quantity is 1.
- Set the Required Checkbox for Options - When you select the **Required** flag for an option product in CPQ, it is considered in Partner Commerce. When you select the **Required** checkbox, it is selected by default in the configuration.

> ⚠ If there is a minimum quantity of 0 specified on the required option, the minimum quantity is ignored. then we ignore the min qty. The default quantity is 1 and you cannot change the quantity to 0.

To set up the action intent as hide in the constraint rule action

1. Go to **Setup** > **Create** > **Objects** > **Constraint Rule Action** and **Action Intent**.

2. From the **Values** related list, click **New**.
3. Enter **Hide** as a picklist value and click **Save**.
4. On the Action Intent details page, from the **Picklist Options** related list > **Controlling Field** > click [**Change**] next to Action Type.
5. From the Exclusion column, double-click **Hide** and click **Save**.

> ⚠ Do not select **Hide** for any other action types.

Supported Capabilities in Partner Commerce

Partner Commerce supports the following capabilities:

Product Attribute Rules

You can configure product attribute rules for attributes with the following action types and have them displayed on the product details page.

> ⚠ The scope must be Product and Product Family. Criteria is not supported at present.

- Allow - To restrict the visibility of values on the target field.
- Default - To add a default value on the target attribute.
- Hidden - To hide the target attribute.
- Disabled - To make the target attribute as a read-only field.
- Required - To make the target attribute as a required field.
- Reset - To auto-populate a default value on the target attribute if the field is left blank.

Attribute Value Matrix

You can configure attribute value matrix with the following application types and have them displayed on the product details page.

> ⚠ The scope must be Product and Product Family. Expressions are not supported at present.

- Default - Enables you to select the picklist values, which you have configured as default values in Matrix View. The rest of the values are visible in the drop-down list, but you cannot select any of them on the Cart.
- Constraint - Enables you to select only those picklist values, which you have configured in Matrix View. All the other values are disabled in the drop-down list on the cart. This also works with the multi-select picklist.

- Force Set - Enables you to automatically set the picklist values, which you have configured in Matrix View (considering the last user selection). As soon as you change the attribute value for one attribute, the system sets values for other attributes.

Option Configuration

The minimum and maximum options configuration works at all levels of option groups. In Partner Commerce, only three levels are supported. Also, the minimum and maximum product quantity and total quantity validation works for all levels of option groups.

Constraint Rules

Constraint Rules are supported for standalone, bundle and option products for basic inclusion, exclusion, and recommendation type rules.

Product level

When you click Add to Cart, Partner Commerce triggers the constraint rule on the Catalog page and product details page where a pop-up is displayed and applies the rule to a product. Moreover, when you hover the mouse on the Add to Cart button, Partner Commerce displays the rule dialog with inclusion and exclusion products. When the inclusion and exclusion rule is triggered, an error message is displayed on the Cart page. Clicking the warning icon against the error message displays the error message in a panel. The scope must be Product, Product Family, and Product Group in constraint rules conditions and constraint rules actions both.

> ⚠ All rules are applied only when you have selected the Match in Primary checkbox.

Inclusion and Exclusion Rules

The following are the supported types of Action Intent:

- Auto Include
- Disable Selection
- Show Message
- Prompt (as per design, displays an error message) acts similarly as Show Message in case of Catalog products.

The inclusion and exclusion rule matches when the scope is Product Family or Product Group. The minimum and maximum match rule for Inclusion must have Include All, Include Any, and Include Min/Max as the rule values. For exclusion type rules, the rule values must be Exclude All, Exclude After One, and Exclude After Max. Error and Warning both are supported. There is no message for successful inclusion of the product; the product is automatically included. In case of Disable Selection action intent, the **Add to Cart** button is disabled with a pop-up message.

Product Options level

The constraint rule is triggered on the product details page where a pop-up dialog is displayed upon selecting an option product. On the Cart page and product details page, an error message or warning is displayed when the product is added to the cart directly. The scope must be Product, Product Family, and Product Group in constraint rules conditions and constraint rules actions. Product Option Group is not supported at present.

> ⚠ All rules are applied only when you have selected the Match in Options checkbox and a combination of the Match in Primary and Match in Options checkboxes.

The constraint rule matches when the scope is Product Family or Product Group. The minimum and maximum match rule for Inclusion must have Include all and Include Any. For exclusion type rules, the rule values must be Exclude all and Exclude any. Error and Warning both are supported. There is no message for successful inclusion of the product. Multiple actions are not supported at present.

Sub-bundle

Sub-bundles created up to level 3 are performance compliant.

Recommendation Rule

Recommendation type rules are displayed on the product details page and cart page. Action Intent is not supported. Multiple AND conditions are supported only within condition association.

Application of Constraint Rules

Pre-requisite:

- Constraint rules must be working correctly in Order UI in standard CPQ
- Constraint Rule Execution Mode in custom settings must be set to 'Server'

Constraint Rules are configuration rules that are applied to a product or a set of products during the ordering process. Constraint rules are configured for the conditional addition of a product to an order or conditional blocker of product additions to an order. You may see Constraint Rules popups on mouse over on the catalog page.

For example, when Product A is added to the cart, Product B may be automatically added based on an auto-inclusion type rule. Similarly, when Product B is added users may be prevented from adding Product C.

> ⓘ In the constraint rule condition criteria, Partner Commerce only supports single or multiple AND operations. OR operations are not supported.

An inclusion type rule is used to add a product to the cart.

- Inclusion Rule for Standalone Products
- Inclusion Rule for Options Products

Exclusion type rule is used to exclude or prevent the addition of a product to the cart

- Exclusion Rules for Standalone Products
- Exclusion Rules for Options Products

Recommendation Rules for Option Products - With these rules set up, based on your selection, you may see product recommendations.

Attribute-based Configuration Rules

Attribute-Based Configuration Rules consist of Attribute Constraint Rules and Attribute Value Matrix. It also supports the following to make navigation easier:

- Support Lookup Attributes for Product Configuration that allows to configure and select attributes of type lookup (reference fields) for standalone and bundle products/options
- Lookup component that can be used as an input field for single select or multi-select lookup fields. For example Account Selection, Product Selection, Primary Contact Selection, Ship to Selection, Bill To Selection (Single Select) and Lookup Attributes on the product details page
- Lookup Quick View Popup for Selected lookup Value shows a quick preview for lookup fields for the selected lookup values. For example Account Selection, Primary Contact Selection, Ship to Selection, Bill To Selection (Single Select), Order Header, Quote Header, and Product Details.

Attribute Constraint Rules

You can execute the Attribute-based constraint rules on the template for Standalone products and bundles that have attributes. This enables you to select the right configuration.

You can use one or more of the following Attribute Constraint Rules:

- Attribute Rules for Standalone product with attributes
- Attribute Rules for Bundle level attributes
- Attribute Rules for Bundle Option level attributes

The scope type for Attribute-Based Configuration Rules are:

- Product Family
- Product Group
- Product

The action type (constraint type) for Attribute-Based Configuration Rules are:

- Allow - Restricts the visibility of values on the target field.
- Default - Adds a default value on the target attribute. This value can be changed later.
- Hidden - Hides the target attribute.
- Disabled - Makes the target attribute as a read-only field.
- Required - Makes the target attribute as a required field.

- Reset - Auto-populates a default value on the target attribute if the field is left blank. This is the same as default and changes disabled.

Attribute Value Matrix

You can execute the Attribute Matrix-based constraint rules on the template for Standalone products and bundles that have attributes. This enables you to select the right configuration.

You can use one or more of the following Attribute Value Matrix criteria:

- Attribute Value Matrix for Standalone product with attributes
- Attribute Value Matrix for Bundle level attributes
- Attribute Value Matrix for Bundle Option level attributes

The scope type for Attribute Value Matrix is:

- Product Family
- Product Group
- Product

The application type for Attribute Value Matrix is:

- Default: Sets the default value of an attribute when criteria are met and the user selects the attributes
- Constraint: Restricts picklist, Multipicklist values of attributes based on the matrix
- ForceSet: Sets single or multiple values of the attributes based on the matrix

Applying Promotions on the Products in the Shopping Cart

Pre-requisite:

- Promotions must be working in core CPQ / Order Management Setup.
- Ensure that Enable Promotions is set to true in the Storefront record

A promotion is a marketing technique that you apply to reduce the list price of a product or a service. You can create such a promotion and restrict the scope, limit, and benefits so your sales representatives apply this promotion to specific products, for specific customers, and for a limited period.

- Apply Automated Promotions in Cart
- Apply Coupon Based Promotions in Cart
- Apply Multiple Promotions to a cart line item
- View all Applied promotions for a given Cart
- View Details of applied promotions for a line item in cart
- View Promotion details at line item level for a given promotion
- View Total Promotion Discount on the cart
- Enable Disable Promotions on Digital Commerce Template

The promotions package is available as an add-on with the CPQ license and package. To install Apttus Promotion Management, see Installing Apttus E-Commerce Package.

You can define Promotions using Promotions admin. For details, refer to Defining a Promotion *in the CPQ on Salesforce Administrator Guide*.

Promotions may include discounts or offers that can be given to the customers to increase sales and promote the products. Promo Code is a code to activate discounts or offers, pertaining to a promotion, on your merchant's Webstore. Once you have finalized your cart, you can enter the Promo Code and activate a promotion.

For example, your merchant provides a 10% discount on your final price on Good Friday. You must enter the promo code provided by your merchant to avail 10% discount on your final price.

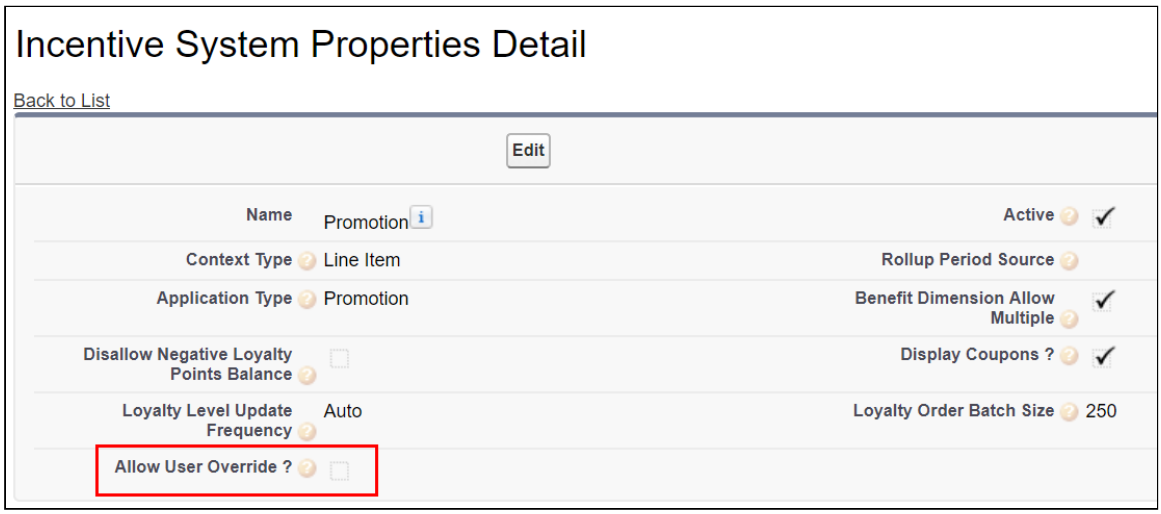
To apply promo code

1. After you have finalized your cart, in the Promotions section, enter the Promo Code and click **Apply**.

A given promotion can be applied to one or more line items in a cart. Promotion can be automatically applied on the cart line items on pricing or can be manually applied by providing coupon code depending on the type of promotion.

Ensure the following custom Setting for Promotions for using Coupon Based Promotions under Incentive System Properties:

- **Allow User Override** = *False*



For Manually applied promotions, "Coupon Codes" are stored in the "Product Configuration" object. After setting the value in "Coupon Codes" field and running update price, will apply the promotions. Each Line Item aggregates the total promo adjustment amount applied from one or multiple adjustment line items in field "Incentive Adjustment Amount". If single promotion is applied, promotion code is also stored at the line item level, in "Coupon Code" field. Details of the promotions applied are captured in "Adjustment Line Item" object which is child object of the "Line Item" object. It contains following critical details: Promotion applied, which line item applied to, promotion amount, promotion code.

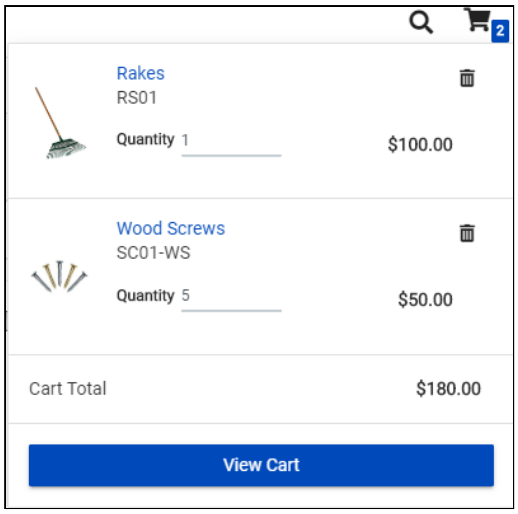
Managing the Cart

From the Cart, you can do one or more of the following:

- View the complete list of selected products
- Change quantities
- Change Start Date and End Date for Subscriptions
- Delete Items
- Navigate to the Product Details page
- View product summary/totals
- Update price
- View configuration details
- Minimum and Maximum validation of Options for Option Groups
- Minimum and Maximum validation of Product Quantity

Mini cart

At any time, you can click the cart icon on the top right of the storefront. The mini cart appears.



From the mini cart, you can:

- View selected products
- Delete items in cart
- Change quantity
- View the full cart

Managing Payments

With the payment integration in place, you can manage payments for your purchases. With payment integration, you can do the following:

- You can make direct payments for orders using a Credit or Debit card during checkout.
- You can view existing payment methods for a logged-in user account.
- You can add or delete existing Payment Methods.
- Make payments using an existing payment method for the order.
- You can add card information for future payments. You can add as many cards as you want.

Viewing Tax Details

With the tax integration in place, you can:

- View Calculated tax summary details for Order on the Checkout page or on Order Summary.
- View Line Item level tax details on View Order Page.

Working with Multi-language Support

The default language is for your Partner Commerce storefront is English. You can change the Language to your preferred language from the User profile in Salesforce. Changing the User Profile language translates the following:

- Static labels and error messages
- Object fields are also known as field label translations
- Data (product, attribute groups, and categories)

To set the default language for a user

1. Go to **Setup > Administration Setup> Managed Users** and click **Users**.
2. Click **Edit** next to the User.
3. In Locale, select a locale. For example Spanish (Mexico).
4. In Language, select your preferred language for the user. For example Spanish.
5. Click **Save**.

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