

APTTUS[®]

Digital Commerce on Salesforce Spring 2019 User Guide

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With the Digital Commerce on Salesforce User Guide, you can find out how Apttus Digital Commerce works and how customers can quickly select products and checkout having a seamless purchasing 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 Digital Commerce. This guide covers the most common use cases for users and assumes a level of familiarity with basic Salesforce.
Primary Audience	End users (Customers) who want to purchase products from your storefront.
IT Environment	Refer to the latest Apttus Digital Commerce on Salesforce Release Notes for information on System Requirements and Supported Platforms.
Updates	For a comprehensive list of updates to this guide for each release, see the What's New topic.
Other Resources	<ul style="list-style-type: none"> • Digital Commerce Implementation and Deployment Guide: Refer to this guide for installing, implementing and deployment of the Apttus Digital Commerce solution. • Digital 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
- Browsing Catalog
- Managing Accounts and Assets
- Product Configuration
- Applying Promotions
- Comparing Product Features
- Managing and checking out the cart

What's New

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

Release	Topic	Description
Spring 2019	All topics	Complete new guide.

About Apttus Digital Commerce

Apttus Digital Commerce empowers enterprises to quickly evolve and scale global Omni-Channel selling strategies. Apttus Digital Commerce provides enterprises with the agility, speed and scale to create unique, valuable customer experiences that drive greater brand consistency and revenue. From streamlining and simplifying complex selling scenarios involving Configure Price Quote to Partner Commerce, Apttus Digital Commerce scales across diverse selling strategies quickly.

Quickly build and launch new sites: Create professional, high-performance, mobile-enabled websites that deliver up-to-the-minute dynamic content in multiple languages and currencies - no additional IT resources needed.

Scale with demand: Scale sophisticated product catalogs, pricing and promotional programs across regions and channels, with automation and administrative capabilities that ensure consistency and precise execution.

Update with clicks, not code: With click to configure technology, your CRM administrator can make strategic updates in minutes. Enterprises can define catalogs, products, service and associated options and promotions once then replicate them across multiple Digital Commerce sites.

General Administration

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

1. [Community Setup](#)
2. [Users and Permission Sets](#)
3. [Adding a Storefront record](#)
4. [Master Data Setup](#)

Permission Sets and User Access

Apttus E-Commerce Permission Set

The E-Commerce package comes with a 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 Selected Profiles column.
4. Under the Select Permission Sets section, from Available Permission Sets column, select *Apttus Ecommerce* and add it to Selected Permission Sets column.
5. Click **Save**.

Master Data Setup

In order for your storefront to display products and pricing associated to it. You must setup master data in CPQ.

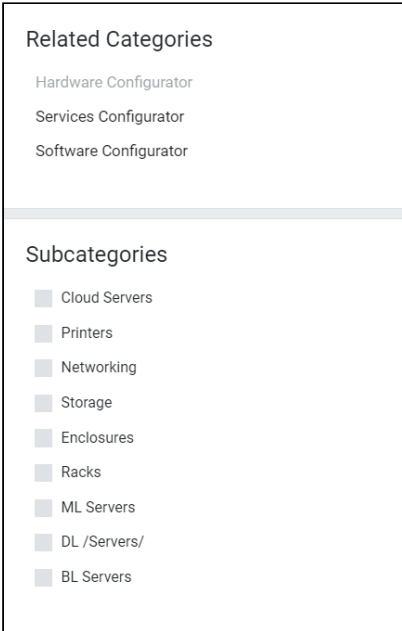
- Product - Define Standalone, Bundle and Option products.
- Pricing - Define Simple Pricing, Price Rulesets, Price Matrix (Attributes / Quantity).

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

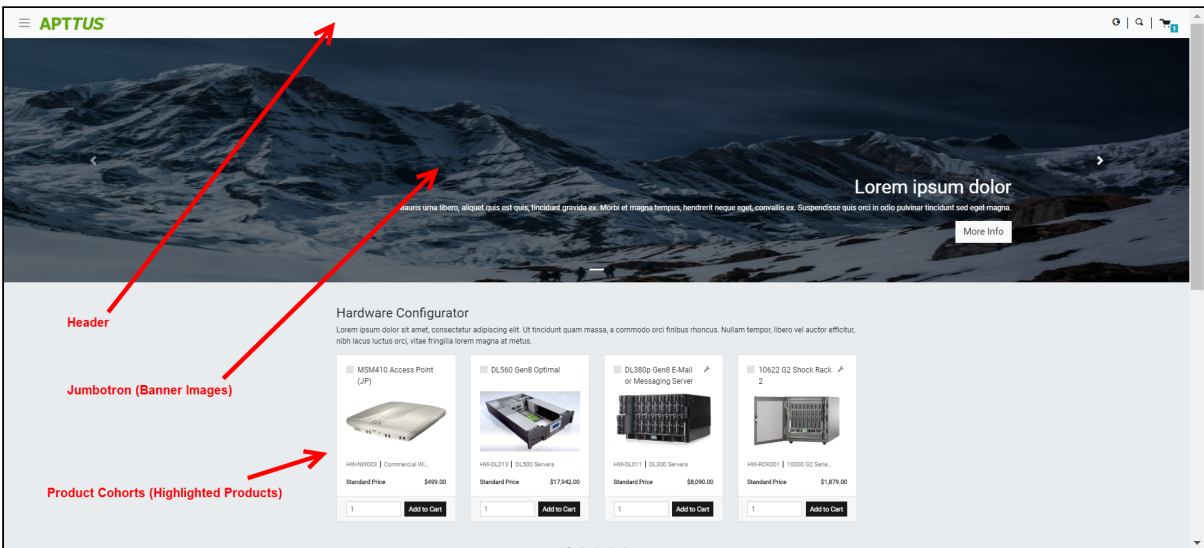
Getting Started

When you launch E-Commerce, the landing page appears. A landing page is the initial or main page of your storefront. You can do one or more the following from the landing page:

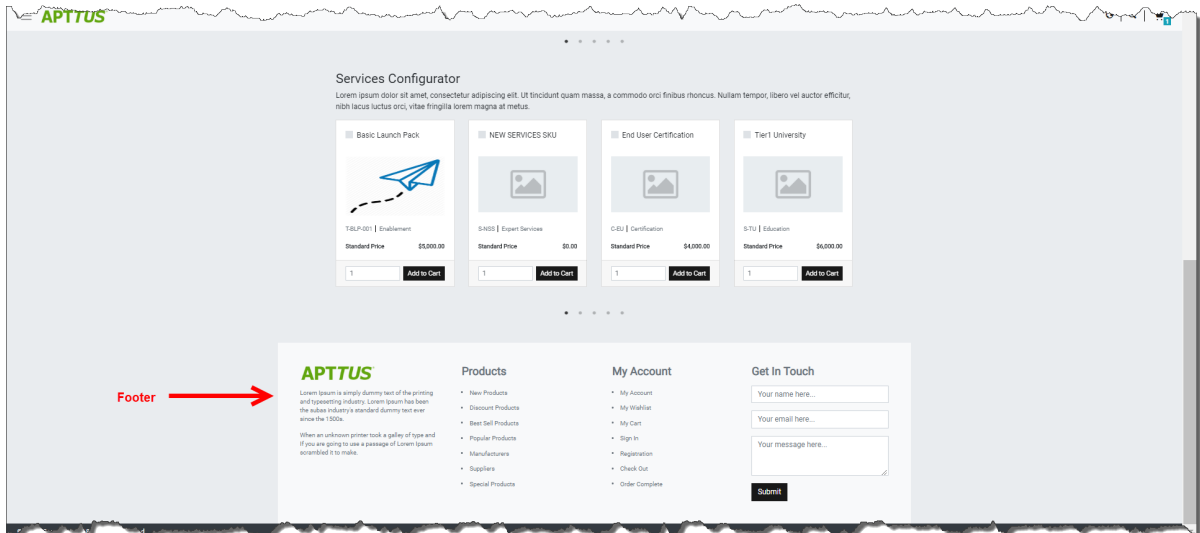
- Navigate through Category Hierarchy



- Navigate through the Header. The header section provides capabilities such as Account management, Multi-currency support, search and mini cart.



- Jumbotron (Banner Images)
- Product Cohorts (Highlighted Products)
- Navigate to other features through the Footer



There are two types of users who can access your storefront - **Guest User** and **Logged in User**.

As a **guest user**, you can do one or more of the following limited tasks:

- Launch E-Commerce
- View banners and highlighted products
- Browse the catalog page and navigate through Category Hierarchy
- View the product details along with its configuration and attachments, if any
- Use text search to search and select a product or product family
- Compare more than one product features

As a **logged in user**, you can:

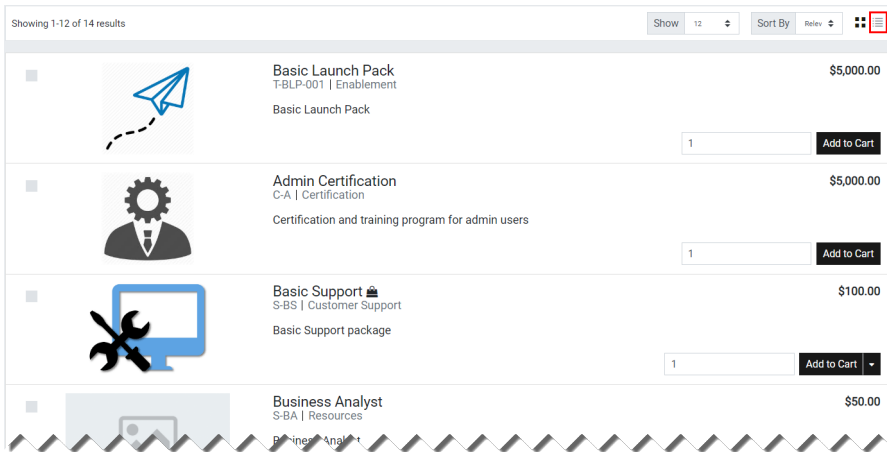
- Log in to E-Commerce
- Access your account page to:
 - View list of orders and its details
 - Open an order
 - View Addresses
 - View Carts / Wishlists
- Browse the catalog page and navigate through Category Hierarchy and add to cart.
- Configure products as follows:
 - Multi-Level Bundles (Nested Bundles)
 - Options & Attributes Configuration
 - Product Level Attributes
 - Option Level Attributes
- If you have Promotions enabled, you can:
 - Auto-apply applicable promotions to the items selected in cart

- View applied promotion details in cart
- Apply manual promotions based on coupons in cart
- View Constraint Rules and add to the cart from the Catalog page
- Compare more than one product features and add to cart directly from the Compare Products page
- If you have Asset Based Ordering enabled, you can view assets on the catalog page through the Installed Products page. You can renew a couple of products and terminate a product. For more details, refer to Asset Based Ordering.
- View and manage mini cart
- Checkout of cart

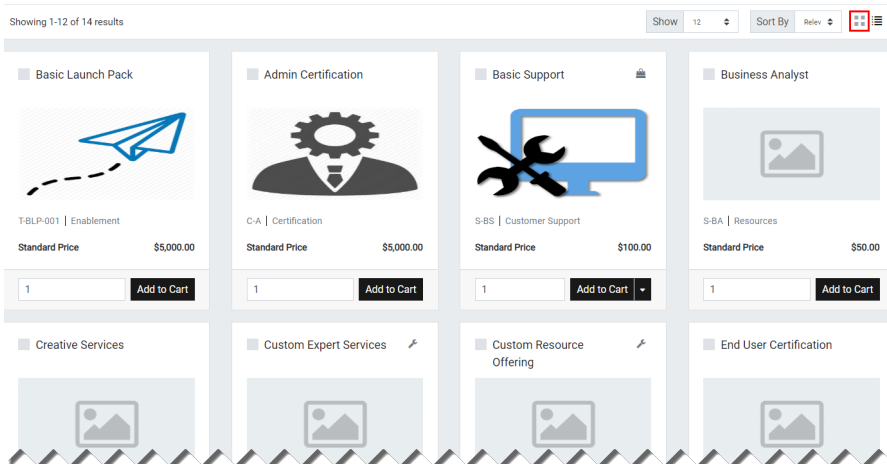
Browsing Catalog

You can view the products that your vendor supplies on the Catalog.

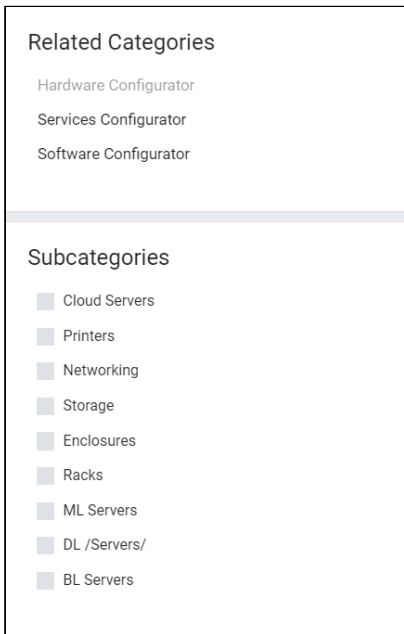
- List View of Products



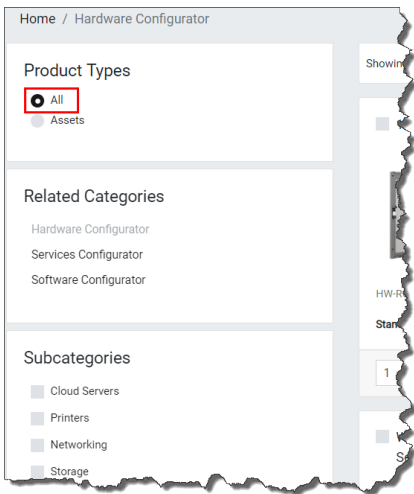
- Grid View of Products



- Category Filtering - Using the Category Hierarchy you can navigate products through categories and sub categories.



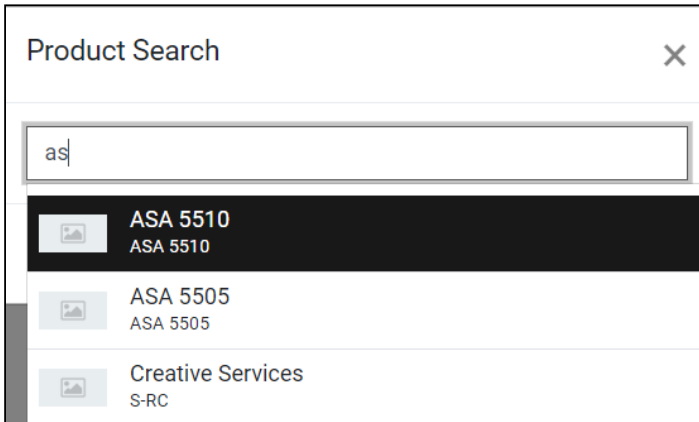
You can go to Product Types section and select All to view all the categories available.



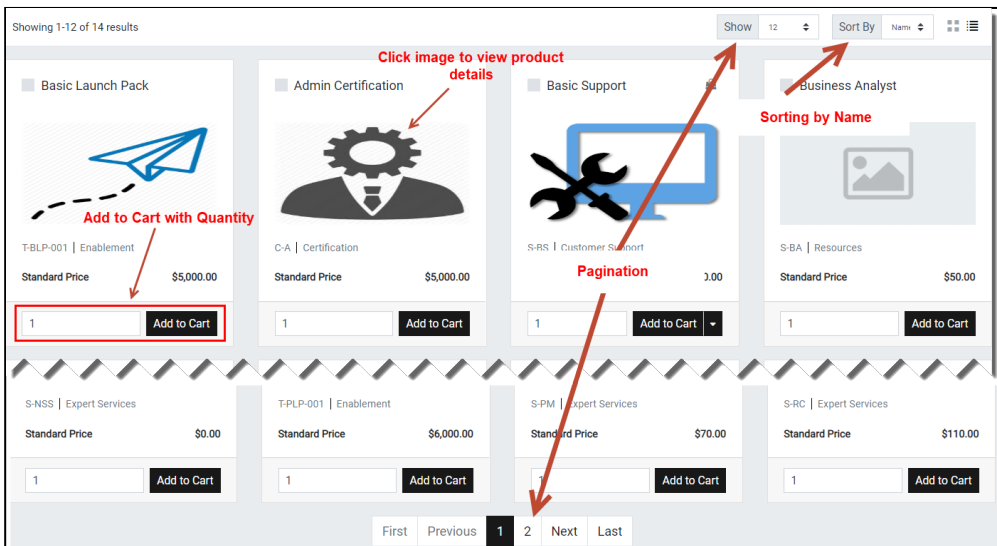
- **Product Family Filtering** - Navigate through the Product Family section and view the products within that product family.



- Product Typeahead Search (SOSL)



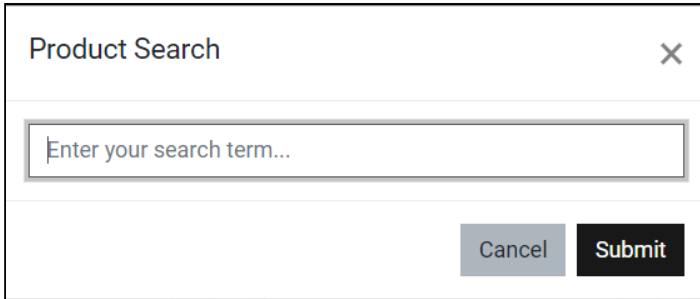
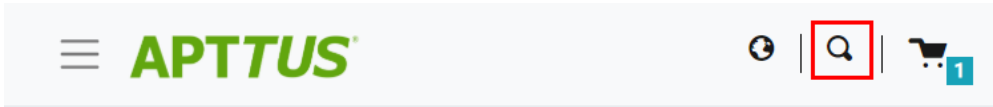
- Sorting by Name
- Pagination
- Click Image to View Product Details
- Add to Cart with Quantity



- Guest User Browsing
- Product Images / Collateral - 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.
- Product Carousel for Selected Products on the Catalog page
- Compare Products - Click the Compare button in the Product carousel to compare one or more products.

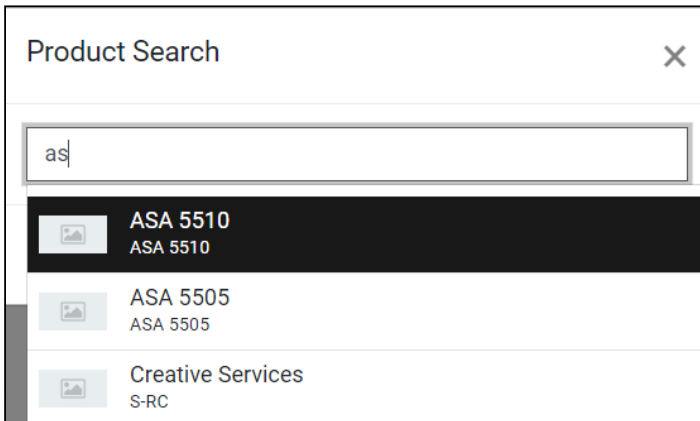
Searching for Products

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 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 are displayed matching the keywords you entered.

You can select a product from the search results and click **Add to Cart** button 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 Information
- 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

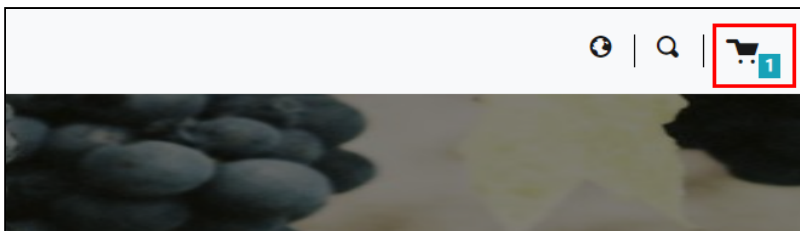
Adding Products to a Cart

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

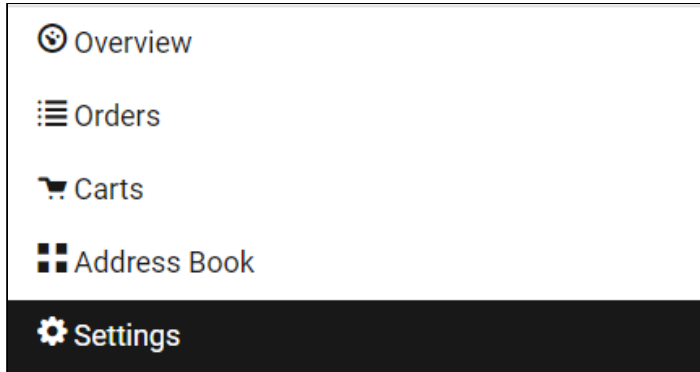
- On the catalog page, click the **Add to Cart** button for the product you want to purchase. You can choose as many products to be added to the cart.
- OR -
- From any product detail page, click **Add To Cart**.

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.



Managing Accounts

The Accounts section contains all the information of a user on your vendor's website. You can access your account after signing in from your vendor's website.



The **Overview** section displays a dashboard with the following details:

- Weekly Orders
- Total Spending
- Orders by Status
- User Information
- Recent Orders

The **Orders** section features the following:

- List of Past Orders
- Order Details
- Order and Order Line Status

On the **Carts** section, you can view multiple In-progress carts and also identify the primary cart. You can also delete a particular cart from the list.

The **Address Book** section enables you to add or update addresses. You modify or delete an address. You can set an address as default.

The Settings section enables you to:

- View Account Details
- View or modify User Information
- Change Password

Managing Assets

Pre-requisite:

- Ensure that Enable ABO is set to true in the Storefront record to use standard template
- Asset Actions is set for Renew / Terminate actions in the storefront object. This field is dependent on Enable ABO flag.

As a Customer Service and Sales Representatives in your organization you can **Renew** and **Terminate** a customer's assets. 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 Digital Commerce Template
- Enable or Disable Renew or Terminate actions on Digital Commerce Template

Renewing an Asset

- Renew for a Standalone Asset from Catalog Page
- Renew for a Standalone Asset from Installed Product Page
- Mass Renewal for Standalone Assets

Terminating an Asset

- Terminate for a Standalone Asset from Catalog Page
- Terminate for a Standalone Asset from Installed Product Page
- Mass Terminate for Standalone Assets

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
- Configure Nested Bundles
- Add Default Configuration from Catalog
- Option Level Attribute Configuration

Application of Constraint Rules

Pre-requisite:

- Constraint rules must be working correctly in Quote/Order UI in standard CPO
- 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 quoting process. Constraint rules are configured for the conditional addition of a product to a quote or conditional blocker of product additions to a quote. 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 user may be prevented from adding Product C.

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 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.

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 the 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 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*

Incentive System Properties Detail

[Back to List](#)

Name	Promotion i	Active	<input checked="" type="checkbox"/>
Context Type	Line Item	Rollup Period Source	
Application Type	Promotion	Benefit Dimension Allow Multiple	<input checked="" type="checkbox"/>
Disallow Negative Loyalty Points Balance	<input type="checkbox"/>	Display Coupons ?	<input checked="" type="checkbox"/>
Loyalty Level Update Frequency	Auto	Loyalty Order Batch Size	250
Allow User Override ?	<input type="checkbox"/>		

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.

Comparing Product Features

Product comparison allows you to compare features of multiple products on the catalog page enabling you to narrow down to products that best fit your needs. You can select more than one product and compare product features in the catalog. A page appears listing the selected products and its features in a tabular form for you to review, compare and make your decision to purchase.

- Select products for comparison from Catalog
- Compare product features for up to 5 products in the compare screen
- Add to Cart from Compare Products screen
- Allow compare only for the products with product features

As a guest user, you can only view the comparison of product features.

As a logged user, you can view the comparison of the product features and choose to add the product to the cart directly from the comparison page.





Managing the Cart

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

- View complete list of selected products
- Change quantities
- Change Start Date and End Date for Subscriptions
- Delete Items
- Navigate to Product Details page
- View product summary / totals
- Update price
- View configuration details

Mini cart

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

	Basic Launch Pack T-BLP-001	
Quantity:	<input type="text" value="1"/>	\$5,000.00
	Business Analyst S-BA	
Quantity:	<input type="text" value="1"/>	\$50.00
Cart Total		\$5,050.00
View Cart		

From the mini cart, you can:

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

Checkout of the Cart

You must Checkout the products to proceed with your order. Only registered users can checkout. The following tasks are followed:

- Screens for Payment Method Capture
- Shipping / Billing Address
- Submit Order
- Item Summary

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