



# Digital Commerce on Salesforce Summer 2020 Patch 1 User Guide



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## About This Guide

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 <a href="#">What's New</a> topic.
Other Resources	<ul style="list-style-type: none"><li>• Digital Commerce Implementation and Deployment Guide: Refer to this guide for installing, implementing and deployment of the Apttus Digital Commerce solution.</li><li>• Digital Commerce SDK: Refer to this guide for technical instructions on the installation and setup of an Apttus E-Commerce storefront.</li></ul>

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.

Document	Topic	Description
Summer20.05.17 (REV C)	<a href="#">Supported Features in Digital Commerce With TurboPricing Integration</a>	Updated topic with the availability of features and capabilities.
Summer 2020 Patch 1 (REV B)	<a href="#">Supported Features in Digital Commerce With TurboPricing Integration</a>	New topic: Supported Features in Digital Commerce with TurboPricing Integration
Summer 2020 Patch 1	<a href="#">Application of Constraint Rules</a>	Updated the topic with information about Constraint Rule Behaviour when Scope = Product Group or Product Family.
Spring 2020	<a href="#">Managing Assets</a>	Updated the topic with information about changes to the Installed Product User Interface.
	<a href="#">Managing the Cart</a>	Updated the topic with information about changes to the My Carts User Interface.
	<a href="#">Product Configuration</a>	Updated topic: <ul style="list-style-type: none"> <li>• Hiding Option Groups and Options</li> <li>• Support for Modifying Option Groups and Options within a Bundle Configuration</li> <li>• Support for Required checkbox for Options</li> </ul>
Winter 2019 Rev B	<a href="#">Product Configuration</a>	Modified topic. Added information for enhancements introduced in Winter 2019 Patch 5.
Winter 2019 Rev A	<a href="#">Product Configuration</a>	Modified topic. Added info for supported capabilities.

Document	Topic	Description
	<a href="#">About Apttus Digital Commerce</a>	Updated topic to conform with Apttus Documentation standards.
Winter 2019	<a href="#">Managing Assets</a>	Modified topic. Added info for changing the configuration for assets from the cart.
	<a href="#">Application of Constraint Rules</a>	Modified topic. Added info for minimum and maximum product validation support.
Summer 2019 Rev B	<a href="#">Application of Constraint Rules</a>	Updated topic. Constraint Rules enhanced to support multiple AND conditions introduced in Summer 2019 Patch 5.
Summer 2019 Rev A	<a href="#">About Apttus Digital Commerce</a>	Updated topic to conform with Apttus Documentation standards.
Summer 2019	<a href="#">Managing Assets</a>	Modified topic.
	<a href="#">Attribute Based Configuration Rules</a>	New topic.
	<a href="#">Requesting a Quote</a>	New topic.
	<a href="#">Managing Payments</a>	New topic.
	<a href="#">Viewing Tax Details</a>	New topic.
	<a href="#">Working with Multi-language Support</a>	New topic.
	<a href="#">Checkout of the Cart</a>	Modified topic.
Spring 2019	All topics	Complete new guide.

# About Apttus Digital Commerce

Digital commerce is the activity of electronically buying or selling products on online services or over the Internet. Digital commerce has three main components: Web Commerce, Mobile Commerce and Social Commerce, thus connecting channels and devices. Apttus Digital Commerce enables consumers to shop from their homes and offices, and even on the move.

As an administrator, you can use Apttus CPQ to perform configuration and pricing tasks to build the catalog page for your Digital 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. The storefront object is very basic and contains only two fields to map a storefront to a price list and logo for the guest user. The price list refers to the price list you want the guest user to access and the logo must be an ID or a URL of the logo attachment for the store. The storefront record also has a banner related list that can be used to set up banners for the jumbotron component in the reference template.

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 Digital Commerce allows a 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 accounts
- Manage assets
- Configure products with options and attributes
- Apply promotions on the products in the shopping cart
- Compare product features
- 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 Digital Commerce.

The differences in feature and capability support in Digital 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 Digital Commerce are:
  - Allow
  - Default
  - Hidden
  - Disabled
  - Required
  - Reset
- For Attribute Value Matrix, the scope must be Product and Product Family. The permitted values for Digital Commerce are:
  - Default
  - Constraint
  - Force Set
- Options Configuration - The minimum and maximum options configuration works at all levels of option groups. In Digital Commerce, only three levels are supported. Also, the minimum and maximum product quantity and total quantity validation work 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.

## Key Terminology

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

Term	Description
Configure Price Quote (CPQ)	Apttus solution for configuring products, setting up pricing, and generating quotes. For Digital 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	A product or service 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.

Term	Description
Promotions	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.
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.

# 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

### 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.

Using the managed permission set may prevent a portal user to login to Digital Commerce. This occurs because the managed permission set does not have API Enabled Permission by default. You must create an unmanaged permission set and enable API permission.

### To enable API permission

1. Clone Apttus Ecommerce permission set and name it Apttus Ecommerce Custom.
2. Go to **Setup > Administration Setup > Manage Users > Permission Sets** and select the permission set. In this case, Apttus Ecommerce and Apttus Ecommerce Custom.
3. Go to **System Permissions** and select to check **API Enabled**.
4. Click **Save**.

Everytime you assign Apttus Ecommerce permission set to a user, you **MUST** assign Apttus Ecommerce Custom permission set as well.

## 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.

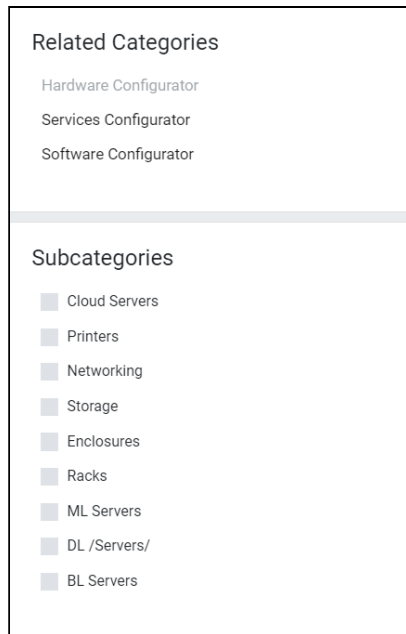
- Product - Define Standalone, Bundle and Option products.
- Pricing - Define Simple Pricing, Price Rulesets, Price Matrix (Attributes / Quantity).

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

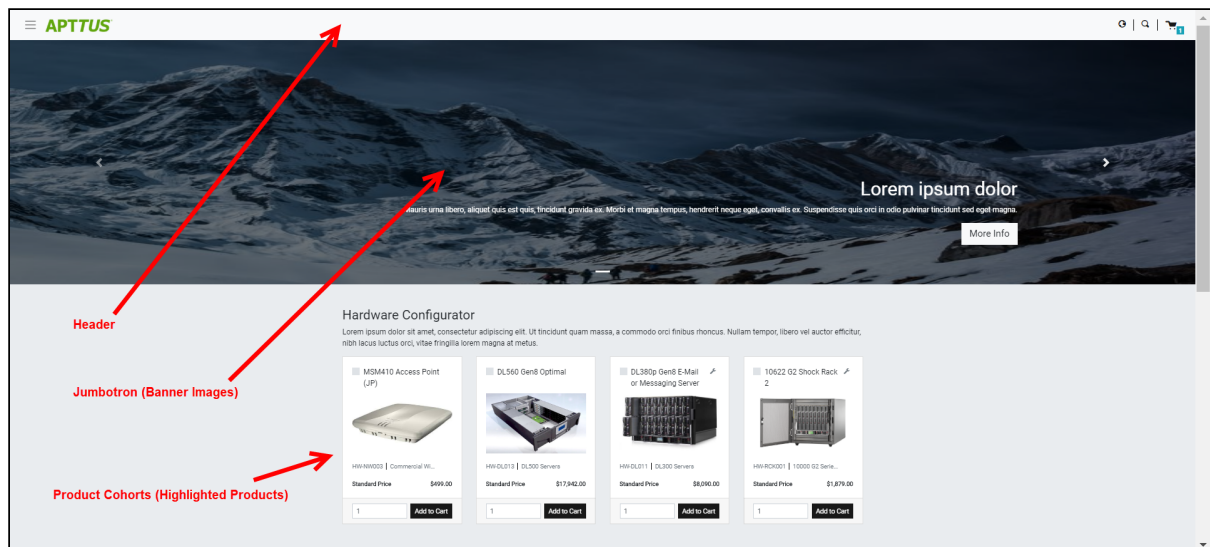
# Getting Started

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

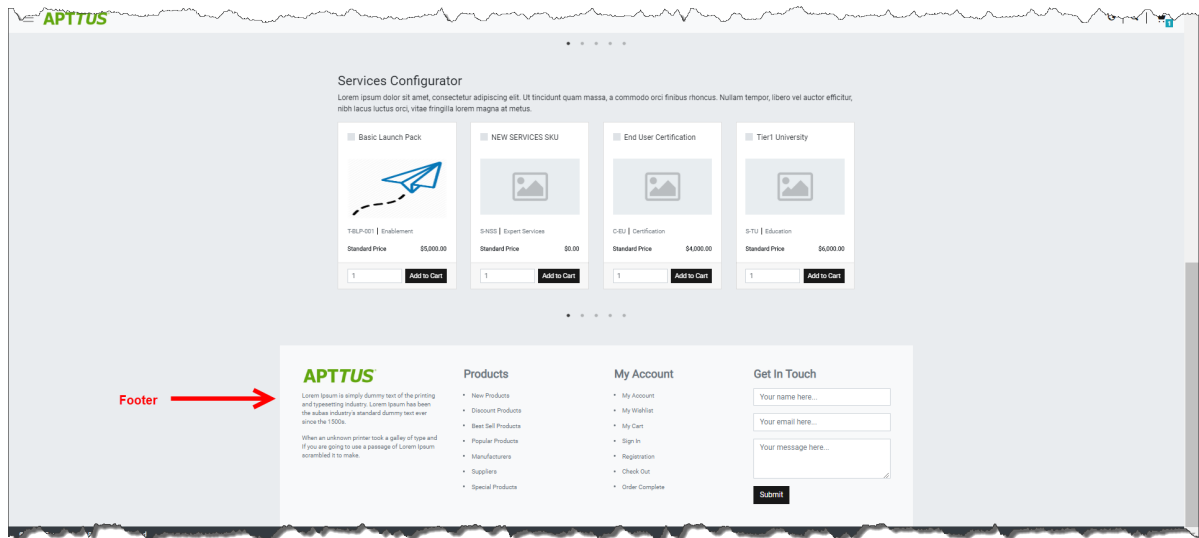


- Navigate through the Header. The header section provides capabilities such as Account management, Multi-currency support, search and mini cart.



- 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:

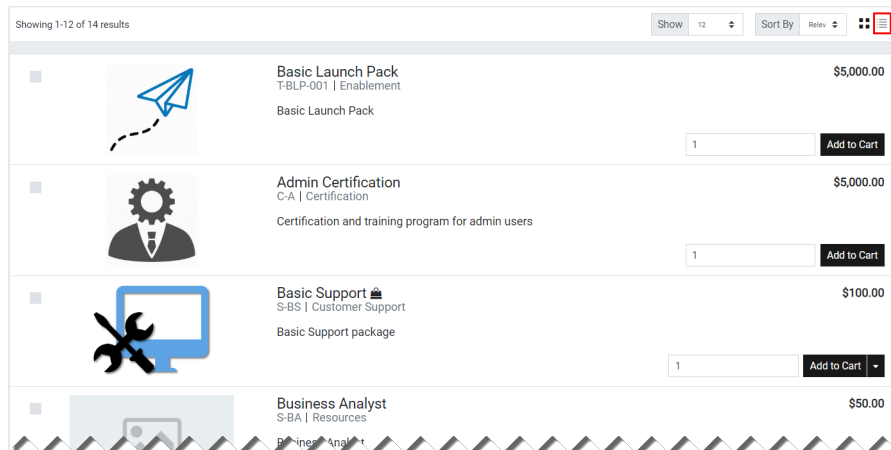
- Log in to E-Commerce
- Access your account page to:
  - View list of orders and its details
  - Open an order
  - View Addresses
  - View Carts / Wishlists
- Browse the catalog page and navigate through Category Hierarchy and add to cart.
- Configure products as follows:
  - Multi-Level Bundles (Nested 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

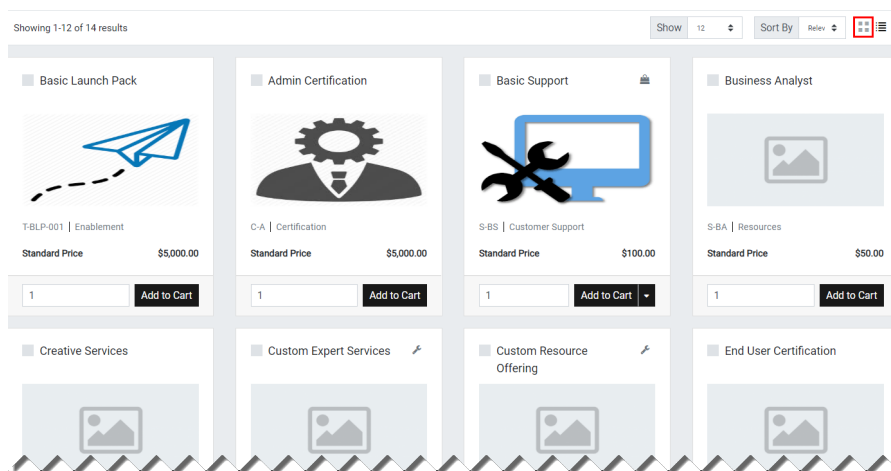
# Browsing Catalog

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

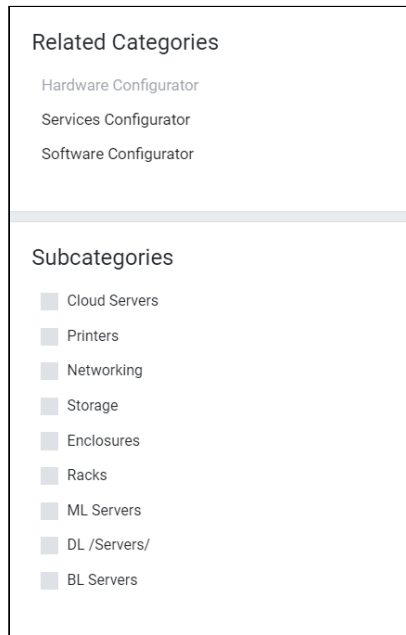
- List View of Products



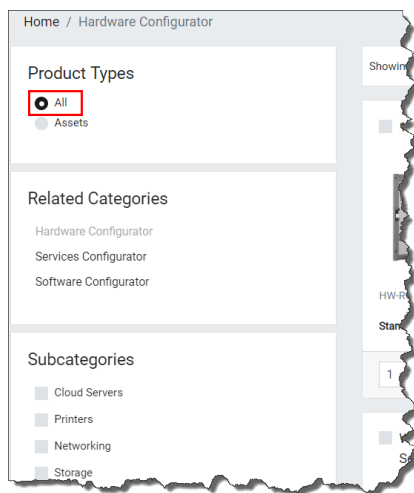
- Grid View of Products



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



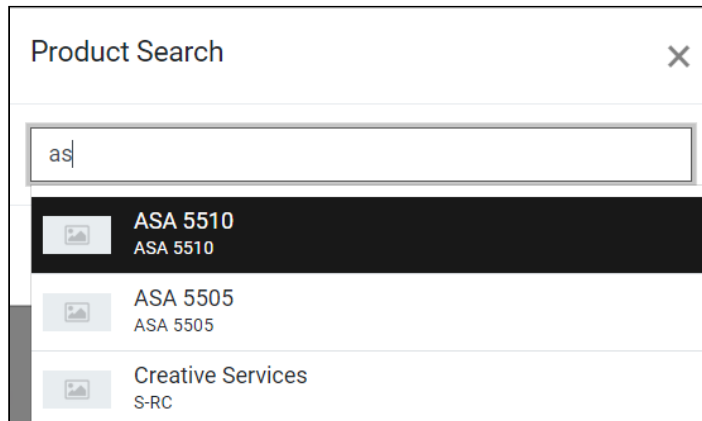
You can go to Product Types section and select All to view all the categories available.



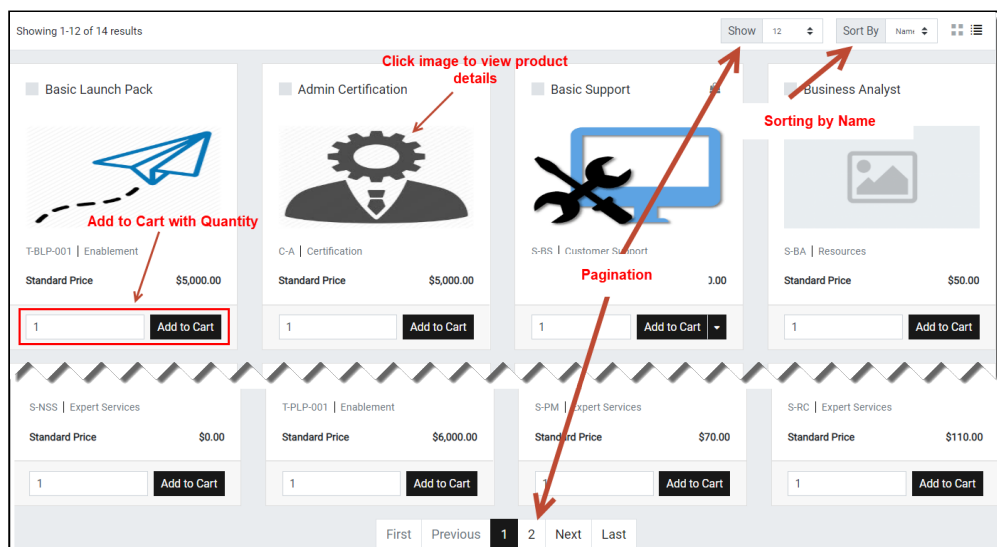
- Product Family Filtering - Navigate through the Product Family section and view the products within that product family.



- Product Typeahead Search (SOSL)



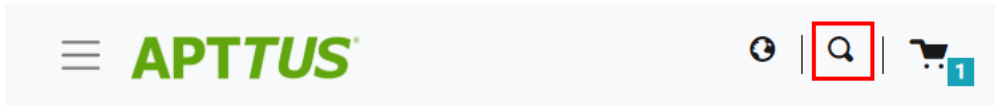
- Sorting by Name
- Pagination
- Click Image to View Product Details
- Add to Cart with Quantity



- 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

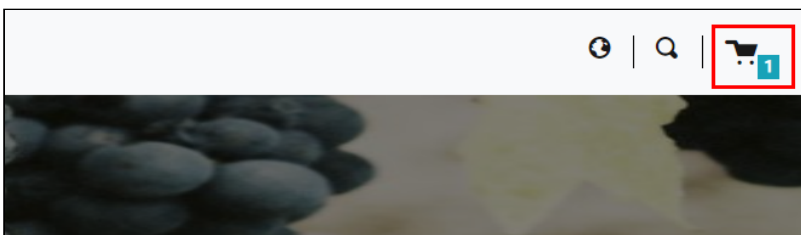
## Adding Products to a Cart

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

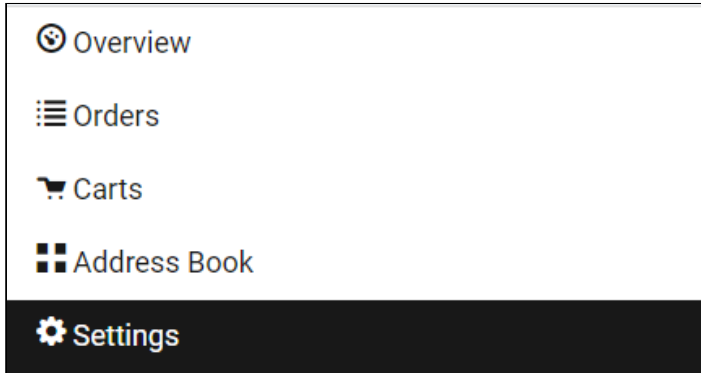
- On the catalog page, click the **Add to Cart** button for the product you want to purchase. You can choose as many products to be added to the cart.
  - OR -
- From any product detail page, click **Add To Cart**.

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 Buy More, Change Configuration, Renew, or Terminate actions on 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. You may even choose to Buy More for an existing asset. You can also change 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
- View the *Assets By Price Type* and *Asset Amounts By Price Type* charts on the Installed Product page
- Enable or Disable ABO on Digital Commerce Template
- Enable or Disable Renew or Terminate actions on Digital Commerce Template

## Using the Standard Table and Chart Component on the Installed Product Page

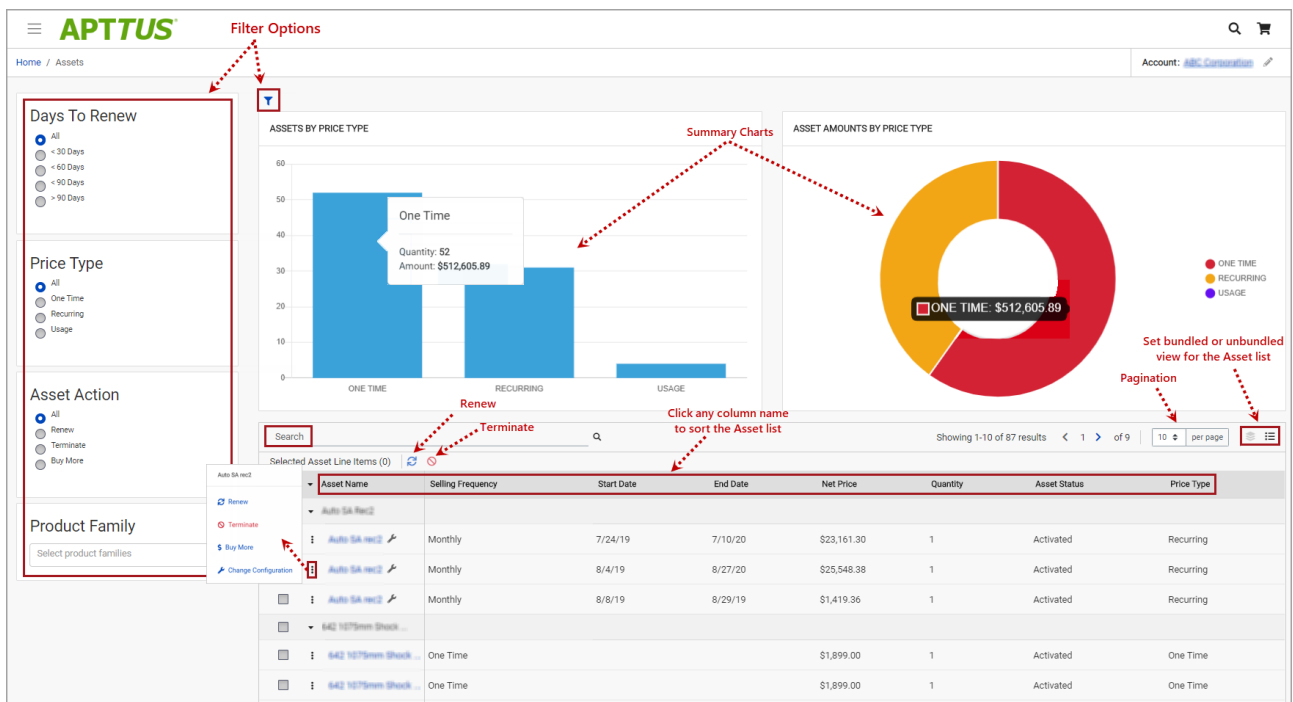
The Installed Product page or Assets page lists all the installed products of the selected account. The Assets list shows the assets with the following details:

- Asset Name
- Selling Frequency
- Start Date
- End Date
- Net Price
- Quantity
- Asset Status
- Price Type

From the Assets page, you can:



- View Summary Charts for Assets
- Filter an Asset
- Search an Asset
- Renew an Asset
- Terminate an Asset
- Buy More Assets
- Change Configuration

You can also sort the asset list, set pagination, and set a bundled or unbundled view for the asset list.



## Filtering Assets in the Installed Product Page

The Installed Product page can show the entire inventory of your assets; therefore, you can use the following filters available on the page to find a particular asset:

- Days to Renew
- Price Type
- Asset Action
- Product Family
- Advanced Filters (  )
- Search Assets (   )

 You can also use a combination of filters to refine your asset list.

## Renewing an Asset

- Renew for a Standalone or a Bundle Asset from the Catalog page (Catalog, Recommendation and Compare Products)
- 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, Recommendation and Compare Products)
- 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, Recommendation and Compare Products)
- 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.


- The overall status for the primary bundle or standalone product is "Amended"
- You cannot change one-time options and the Line Status = "Existing"
- You can edit recurring options and Usage Standalone assets for: Quantity, Switch Options, Select Additional Options, and 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

As a Sales Representative, you can configure attributes or options associated with your products on the Catalog page. You can perform one or more of the following tasks:

- 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 Digital Commerce

Digital 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 Digital 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, Digital 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, Digital 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 Quote/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 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.

You can set up multiple AND conditions in a Constraint Rules criteria, including bundle in any of the conditions. Only ALL is supported at present. You can associate an option with a bundle along with Match in Options, Match in Primary (in case of bundles), or both. Inclusion and Exclusion rules are also supported. For example: If [Option A] AND [Bundle X] (Parent Bundle) THEN Auto Include [Option B].

**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.

### Minimum and Maximum Product Validation Support

The minimum and maximum options configuration now works at all levels of option groups. Also, the minimum and maximum product quantity validation now works for level 1 of option groups. The product details page and the Cart details page also show validation errors for the unfulfilled minimum and maximum options configuration. The **Add to Cart** button on the product details page and the **Place Order** button on the cart details page is disabled until you resolve all the validation errors.

### Behavior of Constraint Rule when configuring Include Any for Scope = Product Group or Product Family

If you configure Include Any in Constraint Rule for Scope = Product Group or Product Family, an error message is displayed on adding more than one option from the selected product group or product family to the cart. The selected option is not displayed in the side navigation bar for resolving the error. You must manually resolve the error from the Product Details page.

## Attribute Based Configuration Rules

Attribute Based Configuration Rules consists 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 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 product details page
- Lookup Quick View Popup for Selected lookup Value shows 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 same as default and change 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 are:


- Product Family
- Product Group
- Product

The application type for Attribute Value Matrix are:

- Default: Sets the default value of an attribute when criteria is met and 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

## Supported Features in Digital Commerce With TurboPricing Integration

The following table lists the availability of features and capabilities supported with TurboPricing Integration. For detailed information on the listed features, refer to the *CPQ Administrator Guide*.

Feature		Sub-Feature
Price Calculation	Bundle Pricing	Price included in bundle set at PLI
		Price included in bundle set at Bundle
		Price Adjustments at Bundle
	Defaulting Quantity	Defaulting term for Bundles/Multiple Charges
	Selling Term	Selling Term <div>  <b>Use Case</b>            When using Selling term, Start Date, and End Date:           <ul style="list-style-type: none"> <li>• If you want the selling term to be calculated based on the End Date, the Selling Term must be explicitly set to Null.</li> <li>• If you want the End Date to be calculated based on the Selling Term, you must only set the Selling Term and the Start Date.</li> </ul> </div>
Price List Item	Price Method	Use of Per Unit Price method
		Use of Flat price Price method
	Frequency	Use of Frequencies Monthly, Quarterly, Half Yearly, Yearly
	Price Type	Use of Price Type - One Time
		Use of Price Type - Recurring
		Use of Price Type - Per unit

Feature		Sub-Feature
		Use of Price Type - Usage  <div>⚠ This is not supported in TurboPricing Mode.</div>
Price Methods	Price Method Per Unit	Use of Price Method Per Unit
	Price Method Flat Price	Use of Price Method Flat price
	Proration	Allow Proration set on PLI  <div>⚠ This works when the <b>Selling Term = Null</b> on the line item.</div>
Price Rule Set	Header Scope and Criteria	Use of Scope Fields - price list, charge type, product family, product group
		Application Level Bundle or Line Item
	Dimension based Price Rules	Use of Adjustment applies to - Base Price
		Use of Adjustment applies to - Base Extended Price
		Use of Adjustment applies to - Extended Price
	Criteria based Price Rules	Use of Adjustment applies to - Base Price
		Use of Adjustment applies to - Base Extended Price
		Use of Adjustment applies to - Extended Price
	Constraint Rule	Auto Include rules
		Recommendation rules
	Multiple Criteria	Multiple Rule Entry Criteria
	Price Matrix	Price Matrix

Feature		Sub-Feature
Incentives	Promotions applied on Line Item	Promotions applied on Line Item
	Promotion	Single Rate Type Promotion
		Apply Coupon
		Multiple Promotions
	Support for Promotion type - Buy X Get X and Buy X Get Y	Promotion with Product Scope as Include (AND)
		Single Rate Type Promotion
		Single Rate Type Promotion with Coupon
		Single Rate Type Promotion with Different Adjustments Applies to values
		Single Rate Type Promotion with Criteria

# 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 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.
2. 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](#)

[Edit](#)

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

You can see the cart details after logging into Digital Commerce. The Carts home page or My Carts page lists all carts that you have created for the selected account. The cart list shows the carts with the following details:

- Configuration Name
- Created Date
- Number of Items
- Is Active
- Total Amount
- Status


From the My Carts page, you can:

- **Create a cart:** You can create a cart by clicking **New Cart**.
- **Search a cart:** You can search for the cart to refine the cart list. Enter a keyword related to the configuration name. It displays all carts that contain that keyword.
- **Delete a cart:** Select a particular cart from the list and then:

Click the more  icon > select **Delete** option.

or

Select a particular cart from the list > click the delete  icon.

- **Set a cart as active:** Select a particular cart from the list > click the more  icon >, and select the **Is Active** option to make that cart as primary cart. The active cart is highlighted with a green color.
- **Sort the cart list:** You can sort the cart list by clicking the column names.
- **Set pagination:** You can set how many carts to be displayed on a single page. To set pagination, go to per page field on the top right bar and select the value from 10, 20, 30, and 40 carts on per page.

Carts (2)

New Cart

Search

Q

Showing 1-2 of 2 results

<

1

>

of 1

10

⌵


per page

Selected Product Configurations (0)


<input type="checkbox"/>	Configuration Name	Created Date	Number Of Items	Is Active	Total Amount	Status
<input type="checkbox"/>	<div><div>:</div><div><a href="#">Demo Cart</a></div></div>	1/27/20, 2:17 PM	3	Yes	\$79.00	New
<input type="checkbox"/>	<div><div>:</div><div><a href="#">Demo Cart 1</a></div></div>	1/27/20, 2:44 PM	0	No	\$0.00	New

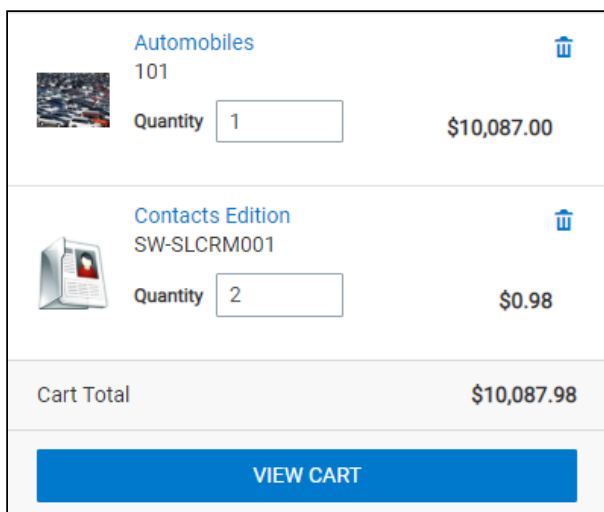
## Performing Asset Based Ordering actions for Installed Products on the Cart page

You can perform all the Asset Based Ordering action (Renew, Terminate, Buy More, and Change Configuration) for installed products on the Cart page.

 You cannot perform Asset Based Ordering (ABO) actions on Onetime products. By default, ABO actions are disabled for Onetime Products. You can perform only Buy More action for the Onetime products.

### Mini cart

While navigating the catalog, at any time if you want to quickly view your selected products, click the mini cart icon  on the top right of the storefront. The mini cart appears.

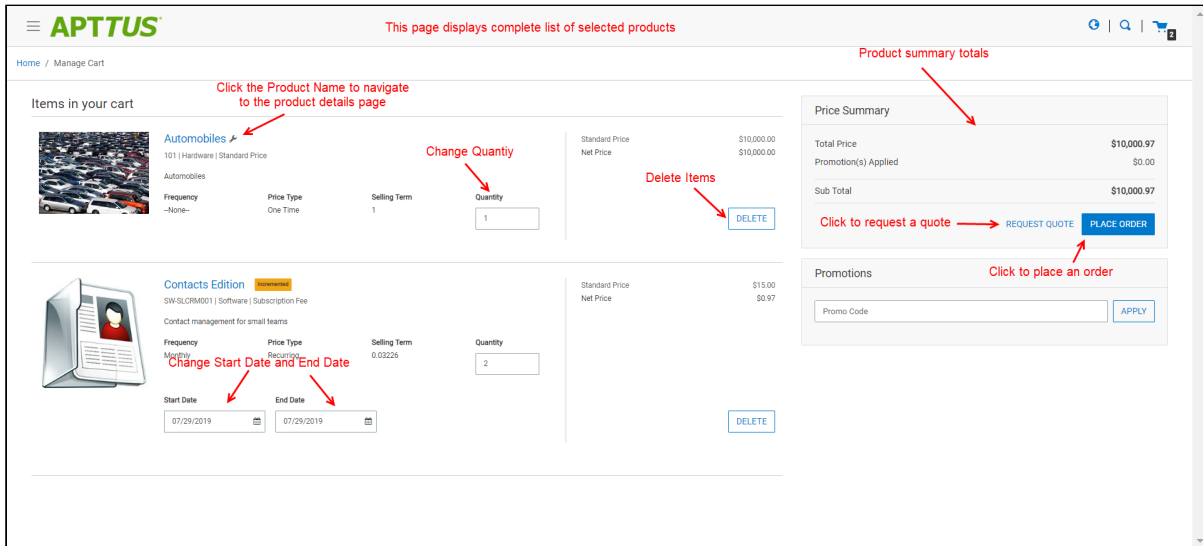


From the mini cart, you can:

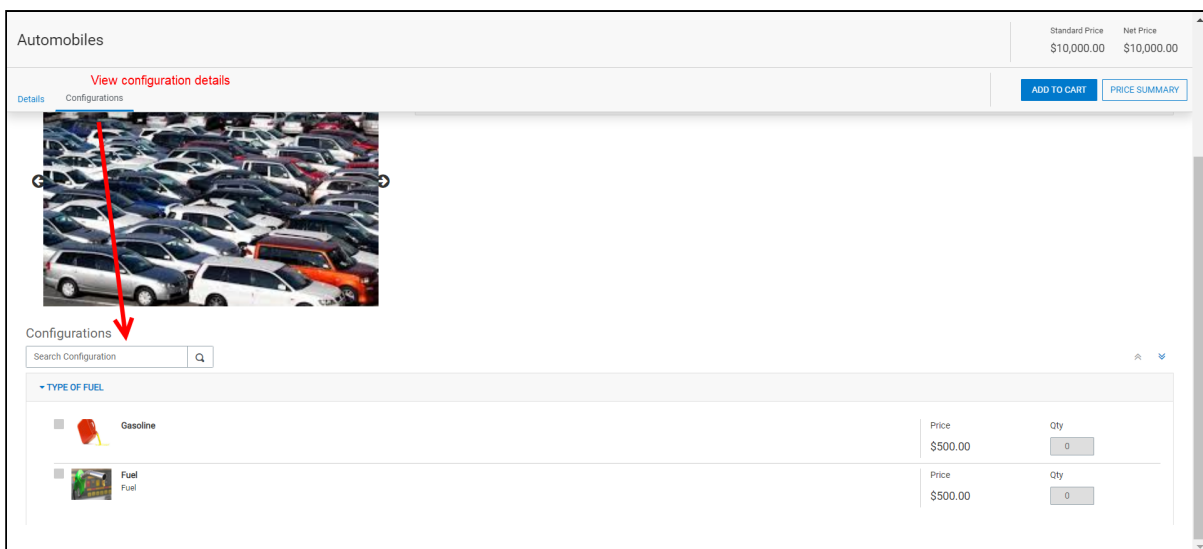
- View selected products
- Delete items in cart
- Change quantity
- [View the full cart](#)

## View Cart

Click the cart icon on the top right of the storefront and then click **View Cart** button to view the full cart. You can do one or more of the following from the full cart:



- View complete list of selected products on the cart or from the [mini cart](#)
- 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



- [Request a Quote](#)

- [Manage Payments](#)
- [View tax details](#)
- [Change language and view translated data](#)

## Requesting a Quote

Digital Commerce enables you to request a quote instead of placing an order directly. This enables you to get better pricing and product configuration.

### Pre-requisite:

- Ensure that Enable Request Quote is set to true in the Storefront record to use standard template.

This feature allows you to:

- Request a Quote: You can request a quote for your cart instead of directly placing an order to get better product configuration and pricing. You can request a quote as a registered logged in user. This feature is not available for guest users. From your cart, when you click Request a Quote, you are presented with a page with the following information to add:
  - a. Quote Title - Enter a meaningful title for your quote
  - b. RFP Response Due Date - Enter a date by which you are expecting a response on the quote request.
  - c. Primary Contact - By default, this field is auto-populated with your name as the Primary Contact. You can choose to change the primary contact to another contact associated with your account.
  - d. Ship To Account- By default, this field is auto-populated with your account along with the address. You may choose to add a different Ship to Account (Address).
  - e. Bill To Account- By default, this field is auto-populated with your account along with the address. You may choose to add a different Bill to Account (Address).
  - f. Comments - You can add additional comments for the seller. For example: Discount needed or mention your budget for the purchase or seek more help with the products to buy and more.
  - g. Click Request Quote. The Quote Request confirmation pop up appears.
- View requested Quote - After you have requested a quote, you can view your requested quote and also track status of the quote from the Request Quote confirmation page or from My Accounts > Quotes page. You can also view and accept quotes that are presented to you for review and proceed to place the order.

- Modify a requested Quote - You can edit the line items in a requested quote to add, modify or delete items. In addition to the line items, you can also modify the following:
  - RFP Response Due Date
  - Primary Contact
  - Ship To Account
  - Bill To Account
  - Comments and Attachments

APTUS

Home / Proposals / Q-00000106

Quote1 PresentedE PRESENTED

Q-00000106

ACCEPT QUOTE

QUOTE SUMMARY | **LINE ITEMS** | COMMENTS | ATTACHMENTS

QUOTE SUMMARY

Created Date: 5/15/19, 4:05 PM

RFP Response Due Date: 5/25/19

Primary Contact: [Name]

Account Name: [Name]

Ship To Account: [Name]

Ship To Address: [Address]

Bill To Account: [Name]

Bill To Address: [Address]

Price Summary

Total Price

Promotion(s) Applied

Estimated Tax

Sub Total

LINE ITEMS

EDIT

24x7 toll-free support

24x7 toll-free support

Frequency: Monthly

Start Date: 05/15/2019

End Date: 06/30/2019

Price Type: Recurring

Line Status: New

Quantity (2): 1

Standard Price

Net Price

Implementation Fee

Net Price

COMMENTS

Add new comment

- View the order generated for the accepted quote and track the status of the order from the My Accounts > Orders and click an Order that you want to view.

APTUS

Home / My Account

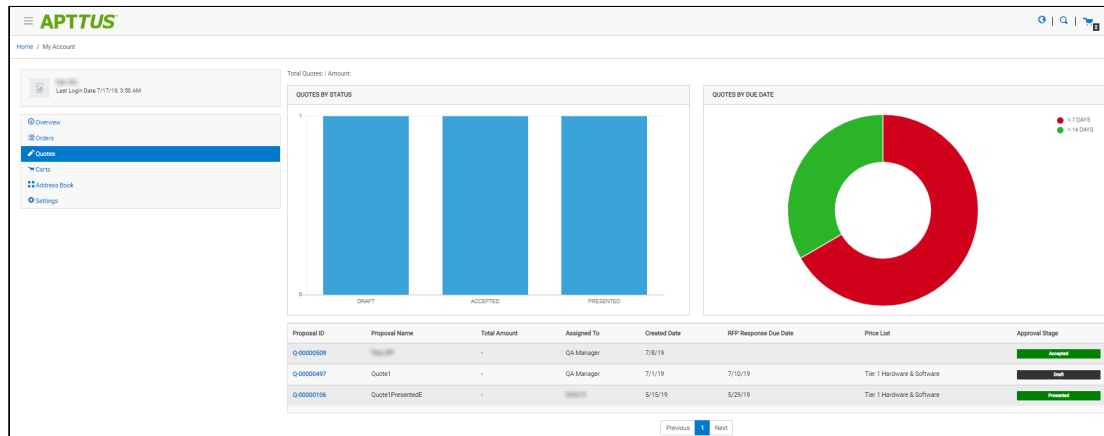
QA DC  
Last Login Date: 7/17/19, 3:50 AM

Orders (1)

Order Number	Amount	Created Date	# of Items	Status
Q-00001809		7/16/19, 3:24 PM	1	Pending
Q-00001808		7/16/19, 3:09 PM	32	Pending
Q-00001807		7/16/19, 3:03 PM	3	Pending
Q-00001804		7/16/19, 2:34 PM	1	Pending
Q-00000825		7/8/19, 3:40 PM	1	Pending
Q-00000802		7/2/19, 3:07 PM	3	Pending
Q-00000791		7/2/19, 12:51 PM	3	Pending
Q-00000790		7/2/19, 12:22 PM	1	Pending
Q-00000769		6/28/19, 11:45 AM	1	Pending
Q-00000767		6/28/19, 11:43 AM	3	Pending

Previous 1 Next

- View Summary Charts for Quote.



## Managing Payments

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

The following capabilities are added:

- As a Guest User or Registered User, you can make direct payments for orders using 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 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 “Quote/Order” on Request Quote/Checkout page or on Quote/Order Summary

The screenshot shows a 'Price Summary' modal with the following details:

Price Summary	
Total Price	\$30.00
Promotion(s) Applied	\$0.00
Estimated Tax	\$0.27

Below this is a 'Tax Summary' modal with a close button (X):

Tax Summary	
State Tax	\$0.17
County Tax	\$0.02
City Tax	\$0.08
Total Estimated Tax	\$0.27

At the bottom right of the Price Summary modal, there is a 'CANCEL' button and a 'REQUEST QUOTE' button. The total amount shown is \$3,828.27.

- View Line Item level tax details on View Quote / View Order Page

The screenshot shows the 'Test 123' quote summary page. It includes a 'QUOTE SUMMARY' section with details like 'Created Date: 7/30/19, 4:56 AM', 'Created By: QA DC', 'RFP Response Due Date: 7/31/19', 'Primary Contact: QA DC', and 'Account Name: ACME TEST 123'. There is also a 'Ship To Account' and 'Bill To Account' section with addresses.

On the right, there is a 'Price Summary' table:

Price Summary	
Total Price	\$10,000.97
Promotion(s) Applied	\$0.00
Estimated Tax	\$87.01
Sub Total	\$10,087.98

Below the quote summary, there is a 'Contacts Edition' section with details like 'SW-SLORM001 | Software | Subscription Fee', 'Contact management for small teams', 'Frequency: Monthly', 'Price Type: Recurring', 'Selling Term: 0.03226', and 'Quantity (Z): 2'. There are also 'Start Date' and 'End Date' fields.

At the bottom right, there is a 'Tax Summary' modal with a close button (X):

Tax Summary	
State Tax	\$0.01
County Tax	\$0.00
City Tax	\$0.00
Total Estimated Tax	\$0.01

## Working with Multi-language Support

The default language for your Digital 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 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.

## Checkout of the Cart

You must Checkout the products to proceed with your order. The below tasks are followed:

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

## Guest User Checkout

As a guest user, you can do the following:

- Add products to the cart
- Place order
- Receive email notification with a link to your order
- View placed order

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DOC ID: DCOMSFSUM20PIUGREVA20201021