# Conga Digital Commerce

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Request quotes or place orders through a single digital commerce platform, providing a unified and modern buying and selling experience.


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# Digital Commerce Release Notes

Discover what's new in the latest release of Conga Digital Commerce.


- May '22 Release Notes


## May '22 Release Notes

In these release notes, you can find packages, requirements, features, enhancements, fixed issues, and known issues for the Digital Commerce May '22 release. For documentation updates, see What's New in Digital Commerce Documentation.

> This documentation may describe optional features for which you have not purchased a license, therefore your solution or implementation may differ from what is described here. Contact your Customer Success Manager (CSM) or Account Executive (AE) to discuss your specific features and licensing.

All Conga customers have FREE access to getting started content and release training in the Conga Learning Center. To take your training further, ensure your organization has access to the Conga Learning Pass, which is a training subscription service. Click here to learn more.

### Packages

The following packages and dependencies are required to upgrade to this release and use its new features. These are the *minimum* required versions; later versions are also supported. Prerequisites for each feature can be found in its documentation. Packages marked **(New)** are new for this release.

> **Important**
>
> You must have Community Portal login credentials to be able to download these packages.

| Package | Latest Certified Version (*Name* / *Number*) |
|---|---|
| Conga Contract Lifecycle Management **(New)** | 13.0.669 \| 13.669 |


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| Package | Latest Certified Version (*Name / Number)* |
|---|---|
| Conga Digital Commerce **(New)** | 6.1.164 \| 6.164<br>May '22<br>⚠ This is a Turbo enabled release. For non-Turbo, see Digital Commerce Winter '20 documentation. |
| Conga Digital Commerce SDK **(New)** | 2201.0.73 (2201) |
| TurboPricing **(New)**<br>(For details, see Enabling TurboPricing in an Org) | 2022.5.0.x |
| Conga Quote Management **(New)** | 12.0.0256 \| 12.256 |
| Conga Base Library **(New)**<br>(Pre-requisite for Installing Conga Configuration & Pricing) | 3.0.232 \| 3.232 |
| Conga Configuration & Pricing **(New)** | 14.0.1995 \| 14.1995 |
| Conga Quote Configuration Integration **(New)** | 14.0.0391 \| 14.391 |
| Conga CPQ Setup **(New)** | 14.0.128 \| 14.128 |
| Conga CPQ API | 13.2.0127 \| 13.127 |
| Conga Promotions<br>(Required if you are using Promotions) | 1.0.0000 \| 1.0 |
| Conga Quote Asset Integration<br>(Required if you are using Assets Based Ordering) | 6.5.0014 \| 6.14 |
| Conga Order Management | 1.0.0000 \| 1.0 |
| Conga Billing **(New)** | 8.0.296 \| 8.296 |


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> For more information on installing Digital Commerce managed packages, refer to Installing Digital Commerce Packages. For more information on upgrading Digital Commerce managed packages, refer to Upgrading Digital Commerce.

# System Requirements and Supported Platforms

For information pertaining to the requirements and recommendations, you must consider before you proceed with the installation of the Conga product suite delivered on the Salesforce platform, see System Requirements and Supported Platforms Matrix.

# New Features

The following features are new to Digital Commerce in this release.

## Requesting a Quote in Partner Commerce

Requesting a Quote feature is now available in Partner Commerce application. Previously, this feature was available only in Digital Commerce. With this feature, as a Partner user, you can:

- Create a quote for a customer so that you can present the quote with the requested products, services, and pricing to the customer.
- View and track quotes for your customers.
- Edit the header and line items in a requested quote to add, change, and delete items in draft stage.
- View and manage details of a requested quote created by the customer or created for the customer.
- Accept the quote on behalf of the customer after receiving confirmation from the customer.

For more information, see Creating a Quote.

## Customized Cart Views for the Cart Details Page

An administrator can now expose more fields to the user on the cart details page using the CPQ Admin console. The administrator can choose the fields to display, sequence those fields, and set editable fields. For more information, see Creating Views for the Cart Details Page.


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As an end user, you can create cart views and select fields (from the fields made available by the administrator) to be displayed on the cart details page. For more information, see Configuring Cart Line Item Fields.

## Application of Multiple Promotions and Coupons with AND and OR Conditions

Digital Commerce now supports application of promotions and coupon codes with AND and OR condition. For more information, see Applying Promotions on the Products in the Shopping Cart.

## Performing Bulk Actions

With the bulk action drawer, you can select multiple products from the catalog and cart items from the manage cart page to perform multiple actions. For more information, see Managing the Cart.

## Favorite Configurations

The Save as Favorite feature enables you to save a cart configuration for reuse. The saved configuration can be used multiple times in the same quote or across different quotes. A saved configuration includes all the selected products on the cart with the options and attributes defined within the product. The configuration can be made public for all users or private to the user who saved the configuration. For more information, Saving a Cart Configuration as Favorite.

## Cloning Primary Line Items

You can clone primary line items and modify it as per your requirement. This feature eliminates the need for you to start configuring a line item from scratch. For more information, see Cloning Primary Line Items.

# Enhancements

The following enhancements are new in this release.


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## TurboPricing Support for Asset Based Ordering (ABO)

Previously, to handle ABO actions on the cart, classic pricing was used. With the May '22 release, TurboPricing support is added for ABO. You can now use TurboPricing for adding asset line items to the cart and checkout. For more information, see Supported Features-in Digital Commerce with TurboPricing Integration.

## Real-time Display of Categories and Products From Active Cart

Previously, switching two different pricelist carts, the application had to be refreshed or you had to re-login to see the categories and products from the selected pricelist.

Now, changing the active cart with a different pricelist displays the categories and products of the selected pricelist on cart in real-time. For more information, see Managing the Cart.

## Build and Consume Frontend or APIs for Catalog Translations

Turbo data APIs can now be used to translate Category names, option group names, and attribute group names. You can even search using the translated category names, option group names, or attribute group names.

## Application URL Redirection

Previously, when trying to access the Quote or Asset record page, the system redirected to the Home page (for Digital Commerce) and Orders dashboard (for Partner Commerce).

With this release, after logging in to the application you will be redirected to the correct record whether Quote, Asset, Order and more.

# Data Model Changes

There are no data model changes in this release.


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# Fixed Issues

The following table lists the issue fixed in this release. If any actions are required, they will be listed in this table.

| Case Number | Conga Internal ID | Description |
|---|---|---|
| 00779401 | DC-7585 | Quote or Asset record page community URL is redirected to the dashboard instead of the Quote or Asset record page.<br>**Resolution:** Application URL Redirection enhancement has been introduced for non-SSO use case. |

# Known Issues

There are no known issues in this release.

DOC ID: DCMAY22RN20220406


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# About Conga 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. Digital Commerce enables consumers to shop from their homes and offices, and even on the move.

As an administrator, you can use CPQ to perform configuration and pricing tasks to build the catalog page for your e-commerce website. 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 an 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. 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 CPQ to configure products and pricing, you can associate the price list to the storefront object within the Digital 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 websites. You can apply promotions, make secure payments, and calculate tax on your cart page.

Digital Commerce allows an administrator to perform the following administrative tasks:

- Set up and activate communities
- Install Digital Commerce Package and dependent packages
- Post-deployment community setup
- Assign Digital Commerce permission set
- Create a custom field on account for the price list
- Set up single and multiple stores


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- Payment integration using Cybersource Payment
- Tax integration with Avalara tax engine
- Set up a multi-language storefront using translations
- Set email notification template for checkout
- Enable state and country picklists
- Add a storefront record
- Add storefront promotional banners and associate it with the storefront record
- Clone and install the reference template
- Configure templates
- Set up the local development environment
- Server Deployment
- Customize your application
    - Customize HTML content and standard components
    - Add custom fields on object models
    - Add custom attributes to a product
    - Customize logic in the services
    - Customize the template page with a custom field
    - Optimize Search Engine

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. For more information, see Product Configuration. The differences in


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feature and capability support in Digital Commerce in comparison with 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 Digital Commerce.

| Term | Definition |
|---|---|
| Configure Price Quote (CPQ) | Conga solution for configuring products, setting up pricing, and generating quotes. For Digital Commerce, CPQ is a pre-requisite for master data setup. |


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| Term | Definition |
| --- | --- |
| 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. |
| 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 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. |
| Constraint Rules | Rules that drive automatic inclusion, exclusion, recommendation, or replacement of products selected on the catalog page. Each Constraint Rule is composed of three parts: the Rule Detail, the Rule Condition, and the Rule Actions. |
| Communities | Conga leverages Salesforce Communities to host your Digital Commerce site providing authentication and hosting features for your storefront. You can create multiple communities within your organization for multiple storefronts. |


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| Term | Definition |
| --- | --- |
| Storefront | A custom object that is part of the E-Commerce package. The storefront object maps a storefront to a price list and other basic information such as logos, banners, and more. |
| Reference template/application | Base template provided by Conga for further development and customization as per your requirement. |
| Payment Integration | Digital Commerce payment integration using Cybersource. |
| Tax Integration | Tax integration using Avalara tax engine with the help of a Tax Callback class. |
| Translations | If your org has multiple languages enabled, use Translation Workbench to maintain your translated labels in your org. You can manage translated values for any Salesforce supported language. |
| Quote | A structured definition of a prospective sale that contains product configurations, pricing, and customer opportunity information. |

For more information about terms used with Conga products, see Conga Product Glossary.


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# What's New in Digital Commerce Documentation

This section lists changes in the documentation to support each release.

**May '22**

| Document | Publication Date | Topic | Description |
|---|---|---|---|
| May '22 | 06 Apr 2022 | Upgrading Digital Commerce | Updated topic with package information. |
| | | Creating Views for the Cart Details Page | New topic with information on setting up views and exposing fields on the cart details page. |
| | | Supported Features in Digital Commerce With TurboPricing Integration | Updated topic with list of supported features. |
| | | Applying Promotions on the Products in the Shopping Cart | Updated topic with information on using multiple promotions and coupon codes. |
| | | Comparing Product Features | Updated topic with further details. |
| | | Managing the Cart | Updated topic with information on drawer enhancement for bulk action. |
| | | Configuring Cart Line Item Fields | New topic with procedure on creating views. |
| | | Saving a Cart Configuration as Favorite | New topic with information on Save as Favorite feature. |


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| Document | Publication Date | Topic | Description |
|---|---|---|---|
| | | Cloning Primary Line Items | New topic |
| | | SDK Reference | All topics updated. |
| | | CPQ REST API Version 4 | New REST APIs added for Save as Favorite feature and Carts APIs updated. |

**December '21**

| Document | Publication Date | Topic | Description |
|---|---|---|---|
| December '21 | 07 Dec 2021 | Upgrading Digital Commerce | Updated topic with package information. |
| | 03 Nov 2021 | Upgrading Digital Commerce | Updated topic with upgrade information from Spring '21 to December '21. |
| | | Clearing the API Cache | New topic with procedure to clear API cache. |
| | | Data Dictionary Object Reference | Updated sub topics with data model changes. |
| | | Adding a Storefront Record | Updated topic with new fields. |
| | | Downloading the Digital Commerce SDK | Updated topic with the new release instructions. |


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| Document | Publication Date | Topic | Description |
|---|---|---|---|
| | | Revalidating the Product Configuration in Digital Commerce | New topic with information on the behavior of revalidation in Digital Commerce. |
| | | Supported Features in Digital Commerce With TurboPricing Integration | Updated topic with list of supported features. |
| | | Managing the Cart | Updated topic with concurrency of actions. |
| | | All topics in Digital Commerce SDK | All topics updated. |
| | | CPQ REST API Version 4 | New topic with existing as well as new and modified REST APIs.<br>• Clone Cart<br>• Create Cart<br>• Get Cart Revalidation Line Items<br>• Apply Revalidated Line Items<br>• Renew Asset<br>• Increment Asset<br>• Amend Asset<br>• Terminate Asset<br>• Generate Document<br>• Abandon Cart |

**Spring '21**

| Document | Topic | Description |
|---|---|---|
| Spring '21 | Changing Collaboration Request Type | New topic for instructions on changing the collaboration type to Digital Commerce. |


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| Document | Topic | Description |
|---|---|---|
| | Digital Commerce Application Caching | New topic for information on the use of API Cache object. |
| | Configuring Digital Commerce Application | Updated information based on complete implementation and deployment. |
| | Adding a Storefront Record | Updated information based on data model changes in the Storefront record. |
| | Setting Up the Embedded UI | New topic added for setting up Embedded UI. |
| | Pricing Mechanism | New topic for defining pricing mechanism. |
| | Enabling API Filters | New topic enabling API filters. |
| | Adding a New Locale | New topic with information on how to add a new locale from the template. |
| | Digital Commerce Package Objects | Updated topic with data model change. |
| | Using Custom Objects Through APIs | New topic for using custom objects through REST APIs. |
| | Launching Digital Commerce | Updated the topic with Spring '21 information. |
| | Browsing the Catalog | Updated images. |
| | Searching for Products | Updated images. |
| | Viewing the Product Details | Updated images. |
| | Adding Products to a Cart | Updated images. |
| | Managing Accounts | Updated the topic with Spring '21 information. |


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| Document | Topic | Description |
|---|---|---|
| | Managing Assets | Updated the topic with Spring '21 information. |
| | Application of Constraint Rules | Updated the topic with Spring '21 information. |
| | Attribute Based Configuration Rules | Updated the topic with Spring '21 information. |
| | Supported Features in Digital Commerce with Embedded UI | New topic listing features capabilities. |
| | Supported Features in Digital Commerce With TurboPricing Integration | Updated the topic with Spring '21 information. |
| | Viewing the Product Details Page in Embedded Mode | New topic to explain the Embedded UI. |
| | Working with the Mini Cart | Updated topic to include mini cart Embedded UI information. |
| | All topics in Digital Commerce SDK | All topics updated. |
| | CPQ REST API Version 3 | • New API's added: Collaboration Request<br>• API's updated with TurboPricing Integration |

**Winter '20**

| Document | Topic | Description |
|---|---|---|
| Winter20.04.16 (REV A) | All topics in Digital Commerce SDK | All topics updated. |


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| Document | Topic | Description |
|---|---|---|
| | CPQ REST API Version 3 | Performance-based update. |
| Winter 2020 | Configuring TurboEngines | New topic: A new feature for this release (TurboPricing Integration) |
| | Upgrading Digital Commerce | Updated information about how to upgrade Digital Commerce. |
| | Supported Features in Digital Commerce with TurboPricing Integration | New topic: Supported Features in Digital Commerce with TurboPricing Integration |
| | Searching for Products | Updated the topic with information about searching the product |
| | All topics in Digital Commerce SDK | All topics updated. |
| | CPQ REST API Version 2 | • New API's added: Assets, Order, and Quote<br>• API's updated with TurboPricing Integration |

**Summer 2020 Patch 1**

| Document | Topic | Description |
|---|---|---|
| Summer 2020 Patch 1 | Upgrading Digital Commerce | Updated upgrade information. |
| | Application of Constraint Rules | Updated the topic with information about Constraint Rule Behaviour when Scope = Product Group or Product Family. |
| | All topics in Digital Commerce SDK | All topics updated. |


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| Document | Topic | Description |
|---|---|---|
| | All topics in Digital Commerce for REST API Developers | API's updated with new config info. |

**Spring 2020**

| Document | Topic | Description |
|---|---|---|
| Spring 2020 | Managing Permissions for Secure Guest User Access to Storefront | Updated topic. Salesforce Winter 2020 security alert introduced during Digital Commerce Winter 2019 and also applicable to Digital Commerce Spring 2020. |
| | Upgrading Digital Commerce | New topic. Added information about how to upgrade Digital Commerce. |
| | Deploying the Application to Salesforce | Updated topic about how to include the UI as a static resource and deploy it to Salesforce. |
| | Managing Assets | Updated the topic with information about changes to the Installed Product User Interface. |
| | Managing the Cart | Updated the topic with information about changes to the My Carts User Interface. |
| | Product Configuration | Updated topic:<br>• Hiding Option Groups and Options<br>• Support for Modifying Option Groups and Options within a Bundle Configuration<br>• Support for Required checkbox for Options |
| | All topics in Digital Commerce SDK | All topics updated. |
| | All topics in Digital Commerce for REST API Developers | Introduction of CPQ REST APIs for Digital Commerce. |


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### Winter 2019

| Document | Topic | Description |
|---|---|---|
| Winter 2019 Rev B | Managing Permissions for Secure Guest User Access to Storefront | New topic. Resolution added to workaround Salesforce Winter 2020 introduced security alert. |
| | Product Configuration | Modified topic. Added information for enhancements introduced in Winter 2019 Patch 5. |
| Winter 2019 Rev A | About Apttus Digital Commerce | Updated topic to conform with Apttus Documentation standards. |
| | Product Configuration | Modified topic. Added info for supported capabilities. |
| | About Apttus Digital Commerce | Updated topic to conform with Apttus Documentation standards. |
| Winter 2019 | All topics | Restructured to reflect the deployment flow. |
| | Managing Assets | Modified topic. Added info for changing the configuration for assets from the cart. |
| | Application of Constraint Rules | Modified topic. Added info for minimum and maximum product validation support. |
| | All topics in Digital Commerce SDK | All topics updated. |

### Summer 2019

| Document | Topic | Description |
|---|---|---|
| Summer 2019 Rev B | Application of Constraint Rules | Updated topic. Constraint Rules enhanced to support multiple AND conditions introduced in Summer 2019 Patch 5. |


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| Document | Topic | Description |
|---|---|---|
| Summer 2019 Rev A | About Apttus Digital Commerce | Updated topic. |
| | Enabling State and Country Picklists | New topic. Salesforce org level setting introduced in Spring 2019 Patch 9. |
| | About Apttus Digital Commerce | Updated topic to conform with Apttus Documentation standards. |
| Summer 2019 | • Payment Integration<br>• Tax Integration with Avalara Tax Engine<br>• Setting Up Multi-language Using Translations<br>• Setting Email Notification Template for Checkout | New topics. New features for this release. |
| | Managing Assets | Modified topic. |
| | Attribute Based Configuration Rules | New topic. |
| | Requesting a Quote | New topic. |
| | Managing Payments | New topic. |
| | Viewing Tax Details | New topic. |
| | Working with Multi-language Support | New topic. |
| | Checkout of the Cart | Modified topic. |


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| Document | Topic | Description |
|---|---|---|
| | All topics in Digital Commerce SDK | All topics updated. |

**Spring 2019**

| Document | Topic | Description |
|---|---|---|
| Spring 2019 | Adding Custom Attributes to a Product | Existing topic. Changed config information. |
| | All topics in Digital Commerce for Users | New section for Digital Commerce users. |
| | All topics in Digital Commerce SDK | All topics updated. |

**Winter 2018**

| Document | Topic | Description |
|---|---|---|
| Winter 2018 | Adding Custom Attributes to a Product | New topic. A new feature for this release. |
| | All topics in Digital Commerce SDK | All topics updated. |

**Summer 2018**

| Document | Topic | Description |
|---|---|---|
| Summer 2018 | All topics in Digital Commerce for Administrators | New section for Digital Commerce administrators with implementation and deployment information. |
| | All topics in Digital Commerce SDK | New section for Digital Commerce SDK for developers. |


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# Digital Commerce for Administrators

This section describes how Digital Commerce works and how to install, implement and deploy Digital Commerce for your customers.

| Topic | Description |
|---|---|
| What's Covered | This section is designed to provide administrators with information on setting up data to be consumed within Digital Commerce. This section covers the most common use cases for administration and assumes a level of familiarity with basic Salesforce. |
| Primary Audience | Admin users responsible for installing, implementing, and deploying the Digital Commerce solution. |
| IT Environment | For information pertaining to the requirements and recommendations, see System Requirements and Supported Platforms Matrix. |
| Updates | For a comprehensive list of updates for each release, see What's New in Digital Commerce Documentation. |
| Other Resources | • See Digital Commerce for Users for basic admin tasks and end-user experience.<br>• See Digital Commerce SDK for technical instructions on the installation and setup of a Digital Commerce storefront.<br>• See Digital Commerce for REST API Developers for details of the CPQ REST APIs consumed by Digital Commerce.<br>• See CPQ documentation for detailed information on setting up the master data. |

This section describes the following tasks:

- Configuring Digital Commerce Application
- Configuring TurboEngines
- Downloading the Digital Commerce SDK
- Cloning and installing the reference template
- Running the Application in Local Host
- Deploying the Application to Salesforce
- Customizing the Digital Commerce Application

Before using Digital Commerce, you must be familiar with the following:


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- Basic Salesforce administration
- Salesforce and Conga terms and definitions

Select one of the following topics for more information:


- Getting Started
- Configuring Digital Commerce Application
- Configuring TurboEngines
- Downloading the Digital Commerce SDK
- Customizing Your Application
- FAQs Tips and Known Issues
- Contact Support


# Getting Started

To get started with Digital Commerce, you must complete the following pre-requisites:

1. Ensure that you fulfill the minimum system requirements.
2. Install Digital Commerce package and all dependent packages in your Salesforce org.
3. Configure Products, Price List, and Catalog and ensure you can create a proposal in CPQ.
4. Ensure you have a User with the System Admin profile.
5. Ensure you have access to the Digital Commerce GIT repository (for base template and all associated libraries).
6. Ensure you have NPM (Node Package Manager) login credentials for Conga NPM private repository.

## System Requirements

Before you install and start using or customizing your application, you must set up your environment for Angular development using the Angular CLI tool. This topic includes information about minimum system requirements and configuring the environment variables.

⚠ Command prompt must run as administrator for all command line operations.

1. Node JS v10.16.2 or higher: Install Node JS from the official Node website. For windows, download Windows installer .msi 64-bit.
2. Angular CLI v12.2.1 or higher:
    - To check if already installed, use command: *ng -v*
    - If not installed, use command: *npm install -g @angular/cli*


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3. Windows Build Tools. Install python gyp using command: *npm install --global --production windows-build-tools*
4. Visual Studio Code
5. JDK / JRE 8 or Higher
6. Apache Ant™ (v1.10.3 or higher) - Install apache-ant-1.10.3-bin.zip or higher

# Environment Variables

When NodeJs, JDK/JRE, and ANT are installed, it is necessary that they are accessible globally using the command prompt. Sometimes the environment variables are not configured and you may see errors stating 'node'/'java'/'ant' is not recognized as an internal or external command. You must configure the environment variables on your local system.

## To configure environment variables

1. Go to **This PC** > **System Properties** > **Advanced System Settings**.


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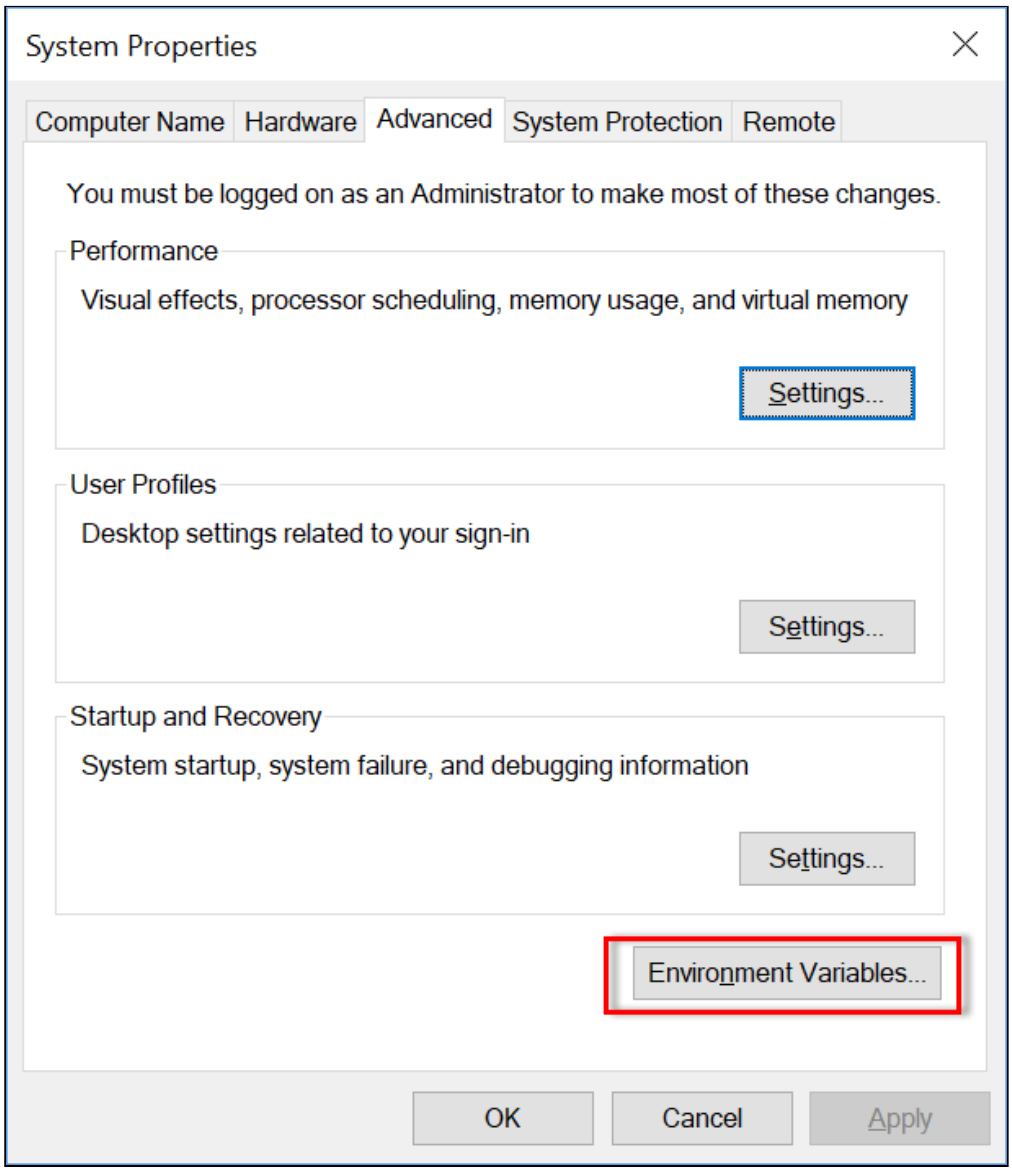
2. Click **Environment Variables**.





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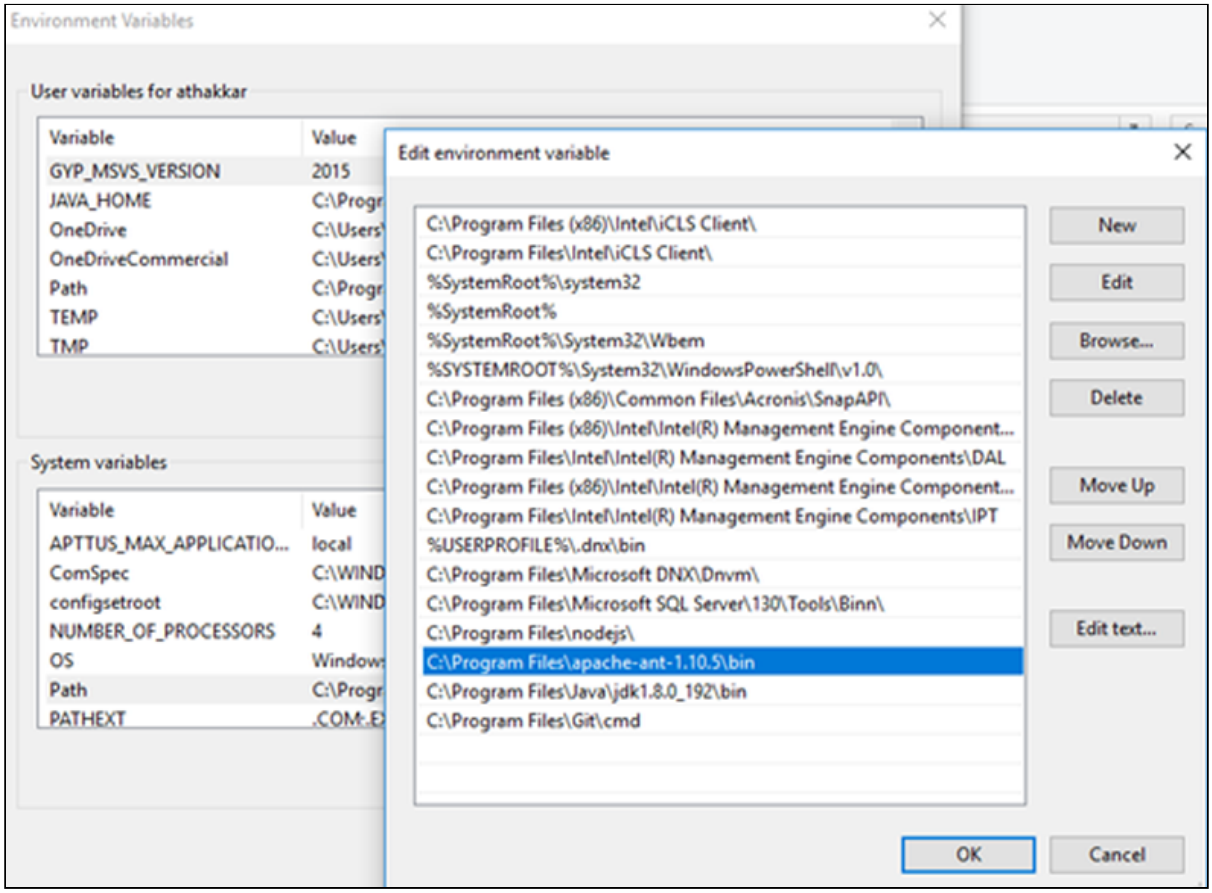
3. Add the necessary paths into the **User Variable.**




# Logging Into Your Salesforce Org

Before you log in, make sure you meet the following criteria.

- All required packages are installed.
- You have administrative privileges.
- You have login credentials provided by Conga.

# To log into the application

1. Go to http://www.salesforce.com.
   Or
   If your organization is using a sandbox or test environment (for example, if you are doing user acceptance testing), go to http://test.salesforce.com instead.
2. In the toolbar at the top of the page, click **Login**. The login page opens.
3. Enter your **User Name** and **Password**, and click **Log in to Salesforce**.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You have successfully logged into the application.

# Setting Up Master Data

In order for your storefront to display products and pricing associated with it. 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 the Product Management and Pricing sections *in the CPQ Guide*.

# Creating Views for the Cart Details Page

An administrator can expose more fields to the end user on the cart details page using the CPQ Admin console. For detailed information on using the CPQ Admin console, see Configuring Cart Page Settings. The administrator can choose the fields to display, sequence those fields, and set editable fields. For information on the display of cart line item fields on the cart details page, see Configuring Cart Line Item Fields.

**Pre-requisite**

You must at least have one flow named **Default**.

## Cart Lines Columns tab

You can add default set of fields for your Default flow from the Cart Lines Columns tab. From the list of fields (metadata) available, you can select the fields (create subset from the metadata) that you wish to display as columns on the cart details page.

**Display of Custom Fields**

You can select custom fields for a view and the same can be displayed on the cart details page. For this to happen, you must create a custom model, that extends the base model and define the custom fields. For detailed information, see Adding Custom Fields on Object Models.


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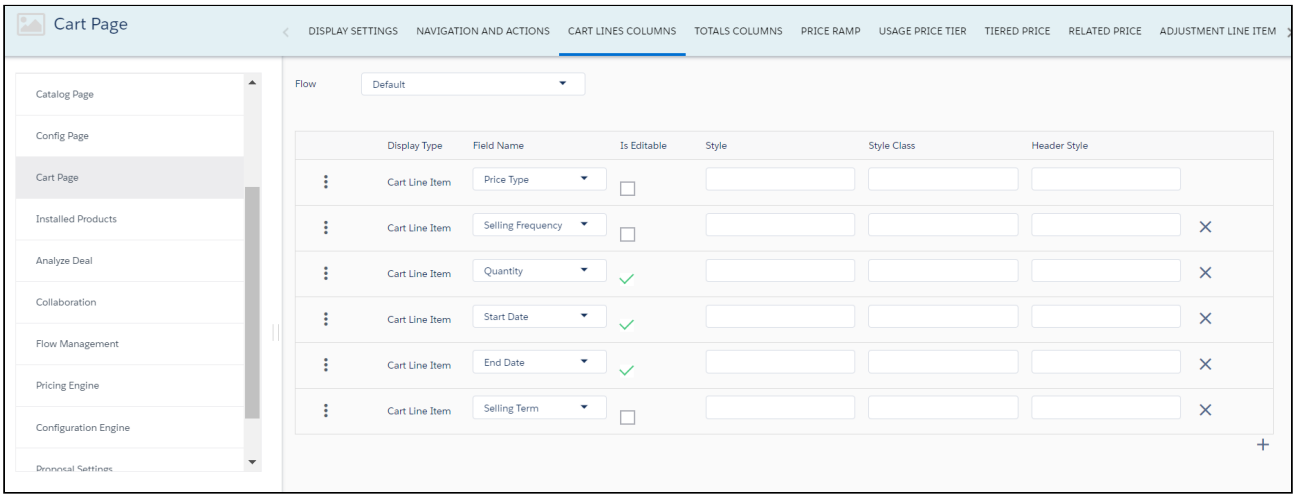


## To add default set of fields

1. Select a flow and enter the following details:
    - Field Name
    - Is Editable

    > **Important**
    >
    > Only three fields are supported as editable by the user - **Start Date**, **End Date**, and **Quantity**. Changing values of these fields by the user triggers pricing immediately. Any other fields, if set as editable may or may not work.

2. Click Save.

# Cart Views tab

You can further define the scope of a flow from the Cart Views tab. You can create views from any flow. Typically, a user always loads with a user view, you should load with the Default flow if available in user view. In case there is no view set up, the system picks up display columns from the Default flow.


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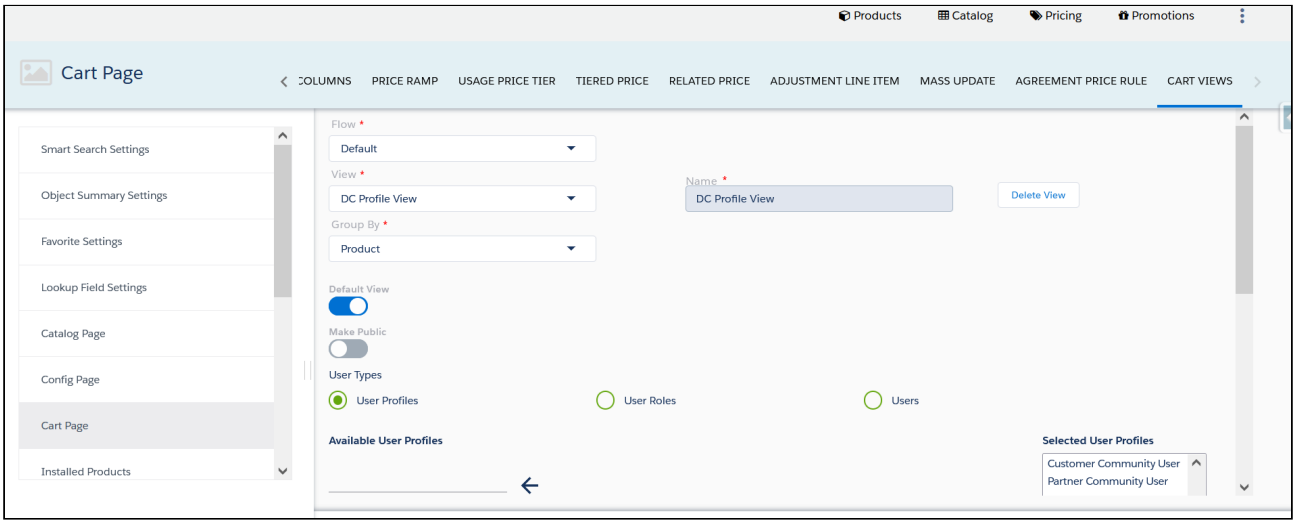
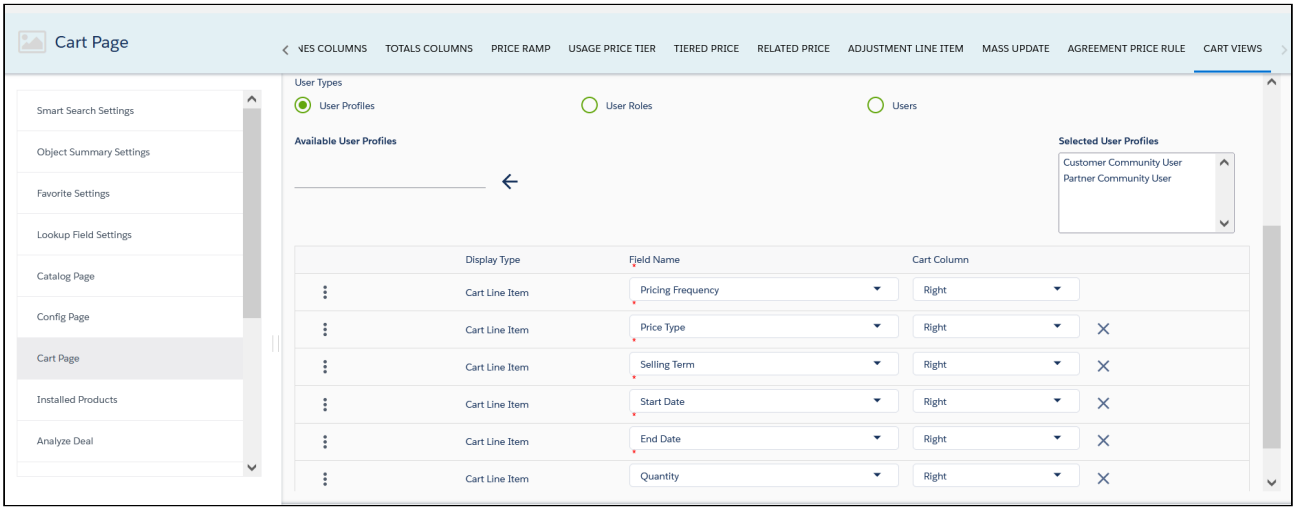



# Creating Views

You can further narrow down the scope of the cart line item fields (selected on the Cart Lines Columns tab) to be displayed on the cart details page. These can be user specific.




## To create views

1. Select a **Flow**.
2. To create a new view, from **View**, select *New*.
3. Provide a **Name** for the view.
4. **Group By** is always *Product*.
5. To set a default view for the cart page, slide to enable the **Default View** switch. Only one default view is supported. By design, if you already have a default view and you create a new view, enabling the Default View switch for the newly created view overrides the previous default view.
6. Enable public view by sliding the **Make Public** switch. By default, it is Protected.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7. From **User Types**, select one of the following:
    - *Users* - To set a view at the user level, search and select a user from the Available Users.
    - *User Roles* - To set a view at the role level, search and select a user role from the Available User Roles.
    - *User Profiles* - To set a view at the profile level, search and select a user profile from the Available User Profiles.

    > In case, you have views at all three levels. For each user type there is one default view.
    > If the default view is not available at user level, the system checks at Role level, then Profile level, and then Public views accordingly.
    > In case, there is no view set up, the system displays all the fields from the default Flow with no preselected fields.
8. Click the + icon to add fields to the flow. The available fields are the one's you selected on the Cart Lines Columns tab.
9. Click Save.

The view is retained for a user on the cart page. The view saved by you is stored in the browser storage which is lost when storage is invalidated or you explicitly delete the user view from the storage.

# Installing Digital Commerce Package

Multiple packages must be installed to implement a complete Digital Commerce solution. Packages for Digital Commerce must be installed in the order indicated in the table in this section. You begin with the base packages and then install the integration packages that enable the various products to function together.

> **Caution**
>
> It is recommended to download and install the required packages in a Salesforce sandbox org **before** installing them in your production environment. For information on installing and upgrading in a sandbox, please contact the Support team before you install any packages.

Install the packages in the following order.


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| Order | Package | Install Center tab to access the package | Required? |
|---|---|---|---|
| 1 | Conga Base Library | Contract Management | Y |
| 2 | Conga Contract Lifecycle Management | Contract Management | Y |
| 3 | Conga Configuration & Pricing | CPQ | Y |
| 4 | Conga Quote Management | CPQ | Y |
| 5 | Conga Quote Configuration Integration | Integrations | Y |
| 6 | Conga CPQ API | CPQ | Y |
| 7 | Conga CPQ Setup | CPQ | Y |
| 8 | Conga Quote Asset Integration | CPQ | Y |
| 9 | Conga Partner Commerce<br>(Required only if you are using Partner Commerce) | CPQ | Y |
| 10 | Conga Digital Commerce | CPQ | Y |
| 11 | Conga Promotions | CPQ | Y |
| 12 | Conga Order Management<br>(Required only if Partner Commerce package is installed) | CPQ | Y |
| 13 | Conga Billing<br>(Required only if Cybersource Payment package is installed) | Billing | Y |

⚠ You must have Conga-provided login credentials to the Community Portal to be able to download packages.


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If, during installation, you see an "Approve Third-Party Access" prompt, please select the **Yes, grant access to these third-party web sites** check box and click **Continue**.

## To install the Digital Commerce managed packages

1. Go to the **Resources** > **Install Center** tab on the Conga Community Portal.
2. In **My Packages** navigation link, click **CPQ** and scroll down to **Conga Digital Commerce**, from the **VERSION** drop-down, select the version that you want to install.
3. Click **Install Version**.
4. Select the environment in which you want to install the packages.
    - To install the packages in your production environment, click **Install in Production.**
      - OR -
      To install the packages in your sandbox, click **Install in Sandbox.**
5. In the Salesforce login screen, enter your login credentials and click **Log In**.
6. On the Upgrade page, enter the password provided by Conga.
7. Select the profile for which you want to install the package. Conga recommends that you select **Install for All Users**.
8. If you want to **Install for Specific Profiles**, you must define the access level for all profiles. Select from one of the following options.
    - **No Access** - This is the default setting. Apply this access level to disable all object permissions.
    - **Full Access** - Apply this access level to assign users permissions to Read, Create, Edit, Delete, View All, and Modify All for all objects in the Approvals package.
    - Apply other access levels to assign users permissions to Read, Create, Edit, Delete, View All, and Modify All for specific objects in the Approvals package.

      If permission is not enabled for a profile, you can apply Conga-provided **Apttus Ecommerce** Permission Set to enhance the access levels of the user profile. To assign a permission set, select it from the **Available Permission Sets** box and click **Add**. To remove **a permission set assignment**, select it from the **Enabled Permission Sets** box and click **Remove**. For more information, see Conga Digital Commerce Permission Set.

9. Click **Set**.


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10. Click **Upgrade**.

A message is displayed indicating the installation is underway. Once installed, repeat this procedure for each of the packages.

> **Important**
>
> Ensure that at least CPQ and Digital Commerce package licenses are assigned to an admin user, community user, and guest user.

# Digital Commerce Package Objects

Digital Commerce is comprised of multiple packages as mentioned in the installation section and this section lists out the objects inside the package.

| Object Name | Purpose of the Object |
|---|---|
| Storefront | Represents the storefront details. |
| Storefront Banner | Represents the storefront banner details. |
| Api Cache | Stores record information such as Line Item Ids and Attribute metadata for quick loading thus improving performance. When changes are made in the metadata of an object you are using, you should always clean the Api Cache objects. |

# Data Dictionary Object Reference

This section provides a list of Digital Commerce objects and their fields.

- Storefront
- Storefront Banner
- API Cache

## Storefront

Represents the storefront details.

### API Name

Apttus_WebStore__Storefront__c


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## Supported Calls

N/A

## Fields

| Label | QualifiedApiName | NamespacePrefix | DataType | Description |
|---|---|---|---|---|
| Asset Actions | Apttus_WebStore__AssetActions__c | Apttus_WebStore | Picklist (Multi-Select) | Asset actions enabled for the Storefront |
| Cache Size | Apttus_WebStore__CacheSize__c | Apttus_WebStore | Number(18, 0) | Displays the number of fields left behind after clearing the API cache. |
| Channel Type | Apttus_WebStore__ChannelType__c | Apttus_WebStore | Picklist | Lists the channel type of the storefront. |
| Configuration Layout | Apttus_WebStore__ConfigurationLayout__c | Apttus_WebStore | Picklist | Lists different layouts. By default, Native is selected. |
| Default Account for Guest Users | Apttus_WebStore__DefaultAccountforGuestUsers__c | Apttus_WebStore | Lookup (Account) | The account used as the default account for orders placed by guest users from E-Commerce |
| Default Locale | Apttus_WebStore__DefaultLocale__c | Apttus_WebStore | Picklist | Default locale for users in the Storefront |
| Default Price List | Apttus_WebStore__DefaultPriceListId__c | Apttus_WebStore | Lookup (Price List) | Default price list used for guest users in the Storefront |
| Enable ABO | Apttus_WebStore__EnableABO__c | Apttus_WebStore | Checkbox | Feature flag to enable ABO capabilities for the Storefront |


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| Label | QualifiedApiName | NamespacePrefix | DataType | Description |
|---|---|---|---|---|
| Enable API Filters | Apttus_WebStore__EnableAPIFilters__c | Apttus_WebStore | Checkbox | When enabled, additional data filters will be applied to APIs related to Storefront. |
| Enable Cart Revalidation | Apttus_WebStore__EnableCartRevalidation__c | Apttus_WebStore | Checkbox | When enabled, cart will be revalidated on application launch, switch to different cart and during edit quote/ order. |
| Enable Promotions | Apttus_WebStore__EnablePromotions__c | Apttus_WebStore | Checkbox | Feature flag to enable Promotions capabilities for the Storefront |
| Enable Request Quote | Apttus_WebStore__EnableRequestQuote__c | Apttus_WebStore | Checkbox | Feature flag to enable request quote capabilities for the Storefront |
| Enable Tax Calculations | Apttus_WebStore__EnableTaxCalculations__c | Apttus_WebStore | Checkbox | Feature flag to enable Tax calculation capabilities for the Storefront |
| Guest Password | Apttus_WebStore__Guest_Password__c | Apttus_WebStore | Text (150) | |
| Guest Password2 | Apttus_WebStore__Guest_Password2__c | Apttus_WebStore | Text (Encrypted) (150) | |
| Guest Username | Apttus_WebStore__Guest_Username__c | Apttus_WebStore | Email | |


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| Label | QualifiedApiName | NamespacePrefix | DataType | Description |
|---|---|---|---|---|
| Logo | Apttus_WebStore__Logo__c | Apttus_WebStore | Text (255) | Attachment Id or URL to the logo used in the digital commerce storefront |
| Translation URL | Apttus_WebStore__TranslationURL__c | Apttus_WebStore | Text (250) | Address to retrieve the translation of custom labels for storefront |

## Storefront Banner

Represents the storefront banner details.

### API Name

Apttus_WebStore__StorefrontBanner__c

### Supported Calls

N/A

### Fields

| Label | QualifiedApiName | Namespace Prefix | DataType | Description |
|---|---|---|---|---|
| Storefront | Apttus_WebStore__StorefrontId__c | Apttus_WebStore | Master-Detail (Storefront) | Master-detail relationship with storefront record used to display banners. |
| Image | Apttus_WebStore__Image__c | Apttus_WebStore | URL (255) | |
| Link | Apttus_WebStore__Link__c | Apttus_WebStore | URL (255) | |


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| Label | QualifiedApiName | Namespace Prefix | DataType | Description |
|---|---|---|---|---|
| Subtitle | Apttus_WebStore__Subtitle__c | Apttus_WebStore | Long Text Area (500) | Text displayed in jumbotron underneath the title |
| Title | Apttus_WebStore__Title__c | Apttus_WebStore | Text (255) | Main text displayed in digital commerce jumbotron component |

## API Cache

Stores record information such as Line Item Ids and Attribute metadata for quick loading thus improving performance. When changes are made in the metadata of an object you are using, you should always clean the Api Cache objects.

### API Name

Apttus_WebStore__ApiCache__c

### Supported Calls

N/A

### Fields

| Label | QualifiedApiName | Namespace Prefix | DataType | Description |
|---|---|---|---|---|
| Data | Apttus_WebStore__Data__c | Apttus_WebStore | Long Text Area (131072) | |
| Identifier | Apttus_WebStore__Identifier__c | Apttus_WebStore | Text (250) (External ID) (Unique Case Insensitive) | |
| Key | Apttus_WebStore__Key__c | Apttus_WebStore | Text (250) | |


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| Label | QualifiedApiName | Namespace Prefix | DataType | Description |
|---|---|---|---|---|
| ProfileId | Apttus_WebStore__ProfileId__c | Apttus_WebStore | Text (18) | User profile ID. |
| Sequence | Apttus_WebStore__Sequence__c | Apttus_WebStore | Number (18, 0) | |
| Storefront | Apttus_WebStore__StorefrontId__c | Apttus_WebStore | Lookup (Storefront) | This is a lookup to the Storefront object. |

# Upgrading Digital Commerce

This section covers all the tasks required for upgrading Digital Commerce to the latest version from the previous two releases.

> ⓘ If you do not have Digital Commerce installed, you can contact the Support Team to request an installation link, then perform the standard installation as described in Installing Digital Commerce Package.

- Preparing for Upgrade
- Upgrading Digital Commerce from December '21 to May '22
- Upgrading Digital Commerce from Spring '21 to May '22
- Performing the Post Upgrade Tasks

## Preparing for Upgrade

Before you upgrade to Digital Commerce, you must ensure the following:

- You go through *Digital Commerce Features by Release* to know about the new features, enhancements, and deprecated features in Digital Commerce since your existing release. After you upgrade Digital Commerce, you cannot roll back to any previous release.
- You have supported platforms and system requirements.
- You have access to the **Install Center** on the Conga Community Portal for Digital Commerce managed package and dependent packages.
- You must have access to the npm-release repository to upgrade Digital Commerce SDK.


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- You have administrator privileges to your Salesforce org.
- You need not back up your configurations. All configurations you performed since you installed your existing release will remain intact after the upgrade.

# Upgrading Digital Commerce from December '21 to May '22

This section describes step-by-step instructions to upgrade your Digital Commerce application and SDK from December '21 to May '22.

## To upgrade Digital Commerce application

1. Go to **Setup** > **Installed Packages.**
2. Refer to the following table to ensure that your Salesforce org has the December '21 packages installed and you have the May '22 packages and dependent packages to upgrade. These packages are required to utilize the new features and enhancements of May '22.

| Package Names | **December '21**<br>*Version Name \| Version Number* | May '22<br>*Version Name \| Version Number* |
|---|---|---|
| Conga Contract Lifecycle Management | 12.2.0654 \| 12.654 | 13.0.669 \| 13.669 |
| Conga Partner Commerce<br>(Required only if you are using Partner Commerce) | 1.0.0000 \| 1.0 | 1.0.0000 \| 1.0 |
| Conga Digital Commerce | 5.2.150 \| 5.150<br>December '21 | 6.1.164 \| 6.164<br>May '22 |
| Conga Digital Commerce SDK | 2103.0.40 (2103) | 2201.0.73 (2103) |
| Conga Quote Management | 11.2.0255 \| 11.255 | 12.0.0256 \| 12.256 |


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| Package Names | **December '21**<br>*Version Name \| Version Number* | May '22<br>*Version Name \| Version Number* |
|---|---|---|
| Conga Base Library<br>(Pre-requisite for Installing Conga Configuration & Pricing) | 2.2.224 \| 2.224 | 3.0.232 \| 3.232 |
| Conga Configuration & Pricing | 13.2.1969 \| 13.1969 | 14.0.1995 \| 14.1995 |
| Conga Quote Configuration Integration | 13.2.0378 \| 13.378 | 14.0.0391 \| 14.391 |
| Conga CPQ Setup | 13.2.124 \| 13.124 | 14.0.128 \| 14.128 |
| Conga CPQ API | 13.2.0127 \| 13.127 | 13.2.0127 \| 13.127 |
| Conga Promotions<br>(Required if you are using Promotions) | 1.0.0000 \| 1.0 | 1.0.0000 \| 1.0 |
| Conga Quote -Asset Integration<br>(Required if you are using Assets Based Ordering) | 6.5.0014 \| 6.14 | 6.5.0014 \| 6.14 |
| Conga Order Management<br>(Required only if Partner Commerce package is installed) | 1.0.0000 \| 1.0 | 1.0.0000 \| 1.0 |
| Conga Billing | 7.3.284 \| 7.284 | 8.0.296 \| 8.296 |

3. Perform the upgrade. The upgrade procedure is the same as the installation procedure. Install the required managed package in the same order as mentioned in


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the table above. For detailed information on installing managed packages, see Installing Digital Commerce Package.

4. After the upgrade is complete, perform the post-upgrade tasks.

## To upgrade Digital Commerce SDK

Refer to the SDK Guide, and go to **Upgrade Information > Upgrading the Digital Commerce Template from December '21 to May '22**. Perform the following tasks:

1. Updating the libraries
2. Updating npmrc file

> **IMPORTANT**
>
> After cloning the reference template, you must update the ***npmrc file*** in the reference template with the SDK library hosted URL as below. Enter your Github authentication token at line 2 after authToken=

```
@congacommerce:registry=https://npm.pkg.github.com/
//npm.pkg.github.com/:_authToken=
```

3. Replacing ProductSelectionService reference
4. Updating ProductConfiguration Input field
5. Updating PriceSummary with Output field
6. Updating installed-products-layout.component file

# Upgrading Digital Commerce from Spring '21 to May '22

This section describes step-by-step instructions to upgrade your Digital Commerce application and SDK from Spring '21 to May '22.

## To upgrade Digital Commerce application

1. Go to **Setup** > **Installed Packages.**
2. Refer to the following table to ensure that your Salesforce org has the Spring '21 packages installed and you have the May '22 packages and dependent packages to upgrade. These packages are required to utilize the new features and enhancements of May '22.


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| | Package Names | **Spring '21**<br>*Version Name / Version Number* | May '22<br>*Version Name / Version Number* |
|---|---|---|---|
| 1 | Conga Contract Lifecycle Management | 12.0.0605 \| 12.605 | 13.0.668 \| 13.668 |
| 2 | Conga Partner Commerce<br>(Required only if you are using Partner Commerce) | 1.0.0000 \| 1.0 | 1.0.0000 \| 1.0 |
| 3 | Conga Digital Commerce | 5.0.131 \| 5.131<br>Spring '21 | 6.0.163 \| 6.163<br>May '22 |
| 4 | Conga Digital Commerce SDK | 2101.0.102 (2101) | 2103.1.17 (2103) |
| 5 | Conga Quote Management | 11.0.0242 \| 11.242 | 12.0.0256 \| 12.256 |
| 6 | Conga Base Library<br>(Pre-requisite for Installing Conga Configuration & Pricing) | 2.0.150 \| 2.150 | 3.0.229 \| 3.229 |
| 7 | Conga Configuration & Pricing | 13.0.1882 \| 13.1882 | 14.0.1989 \| 14.1989 |
| 8 | Conga Quote Configuration Integration | 13.0.0354 \| 13.354 | 14.0.0384 \| 14.384 |
| 9 | Conga CPQ Setup | 13.0.97 \| 13.97 | 14.0.127 \| 14.127 |
| 10 | Conga CPQ API | 13.0.0120 \| 13.120 | 13.2.0127 \| 13.127 |


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| | Package Names | **Spring '21**<br>*Version Name / Version Number* | May '22<br>*Version Name / Version Number* |
|---|---|---|---|
| 11 | Conga Promotions<br>(Required if you are using Promotions) | 1.0.0000 \| 1.0 | 1.0.0000 \| 1.0 |
| 12 | Conga Quote -Asset Integration<br>(Required if you are using Assets Based Ordering) | 6.5.0014 \| 6.14 | 6.5.0014 \| 6.14 |
| 13 | Conga Order Management<br>(Required only if Partner Commerce package is installed) | 1.0.0000 \| 1.0 | 1.0.0000 \| 1.0 |
| 14 | Conga Billing | 7.1.262 \| 7.262 | 8.0.293 \| 8.293 |

3. Perform the upgrade. The upgrade procedure is the same as the installation procedure. Install the required managed package in the same order as mentioned in the table above. For detailed information on installing managed packages, see Installing Digital Commerce Package.
4. After the upgrade is complete, perform the post-upgrade tasks.

## To upgrade Digital Commerce SDK

Refer to the SDK Guide, and go to **Upgrade Information > Upgrading the Digital Commerce Template from Spring '21 to May '22**. Perform the following tasks:

1. Updating the libraries
2. Updating References to SDK libraries across all files
3. Updating npmrc file

> **IMPORTANT**


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After cloning the reference template, you must update the ***npmrc file*** in the reference template with the SDK library hosted URL as below. Enter your Github authentication token at line 2 after authToken=

```
@congacommerce:registry=https://npm.pkg.github.com/
//npm.pkg.github.com/:_authToken=
```

4. Upgrading to Angular 12
5. Upgrading other dependencies
6. Moving "lodash" and "locale-currency" to package dependencies
7. Enabling Ivy
8. Updating Angular and Karma configurations
9. Updating pricing mode flag
10. Replacing ProductSelectionService reference
11. Updating ProductConfiguration Input field
12. Updating PriceSummary with Output field
13. Updating installed-products-layout.component file

## Performing the Post Upgrade Tasks

After you upgrade to this Digital Commerce release, consider the following options and requirements:

- Managing Permissions for Secure Guest User Access to Storefront
- All upgrade scenarios must work the same way as the previous release.
  - Layout changes: Validate layout changes.
  - RemoteAPIcalls: All API calls must be functional.
- Changing Collaboration Request Type

⚠ The upgrade procedure above is tested against basic setup and not custom code or trigger.

# Configuring Digital Commerce Application

This topic covers step by step instructions for configuring the Digital Commerce application in your Salesforce Org.


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- Enabling Communities
- Creating Region Field
- Setting Up Communities
- Registering a Salesforce Sites Domain
- Creating Sharing Rules For User And Storefront
- Configuring Remote Site Settings for Community URL
- Configuring Custom Settings
- Creating Community Users
- Conga Digital Commerce Permission Set
- Enabling State and Country Picklists
- Changing the Collaboration Request Type
- Adding a Storefront Record
    - Adding Storefront Promotional Banners
- Managing Permissions for Secure Guest User Access to Storefront
- Enabling API Filters
- Payment Integration with Cybersource Payment
    - Creating a Cybersource Account with the Secure Acceptance Method
    - Configuring the Payment Form
    - Creating Profiles in Custom Settings
    - Defining Custom Labels
- Tax Integration with Avalara Tax Engine
    - Setting Up Tax Integration
- Setting Up Multi-Language Using Translations
    - Setting Up Translations using SDK
    - Setting Up Translations Using Salesforce
    - Setting Up Translations using Translation Workbench
    - Adding a New Locale
- Setting Email Notification Template for Checkout
- Creating Lookup Field on Account for the Price List
- Digital Commerce Application Caching
    - Clearing the API Cache
    - Disabling the API Cache


# Enabling Communities

Enabling Communities is the first step to creating communities.


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## To enable community

1. Go to **Setup > Customize > Communities > Communities Settings** and select **Enable communities**.
2. Select a domain name for your communities, and click **Check Availability** to see if the domain name is available.
3. If you see a success message, click **Save**.

The Communities page is refreshed and displays the All Communities section.

# Creating Region Field

Perform the following steps to create a Region picklist field:

1. Go to **Setup,** in the Quick Find box, search for *Users***,** and select **Fields** option under the Users.
2. Go to the **User Custom Fields** section and click **New**.
3. Select **Picklist** as *Data Type* and click **Next**.
4. Enter **Region** as a *Field Lable*.
5. Select **Enter values, with each value separated by a new line** option under *Values,* and add picklist values for the region and click **Next**.
6. Mark the profiles as **Visible** to which you want to grant edit access to this field via field-level security and click **Next**.
7. Click **Save.**

# Setting Up Communities

The Digital Commerce platform leverages a Salesforce Community to provide authentication and hosting features for guest users. After the Digital Commerce package is deployed, the next step is to create a Salesforce Community. At a minimum, you just need the community URL. However, if you intend to support guest users, you will need to enable that within the community settings. After deployment, the angular library will provide a Visualforce page that you can set as the default page for all page settings within the community. For example home, login, forgot password, change password, and more). Being that it is a single-page application that is designed to handle all incoming requests.


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# Creating Communities in your Org

The default storefront for E-commerce is created with the Digital Commerce package. You need to create a community for E-commerce.

You can create communities using a wizard. This wizard helps you select community templates that suit your business requirement.

## To create a community

1. Go to **Setup > Customize > Communities > All Communities** and click **New Community**.
2. Select from one of the Standard Community templates. For example, Salesforce Tabs + Visualforce.
3. Click **Get Started**.
4. Type a community **Name**. **URL** displays the domain name of your community. In **Optional**, type a suffix for your community and click **Create**. For example, Name = E-Commerce or Partner Commerce, Optional = ecom or pcom.

Your community is created.

# Creating Sites

Sites enable you to create your Digital Commerce websites that are directly integrated with your Salesforce org—without requiring users to log in with a username and password. To create sites, refer to Create Sites for detailed information.

# Activating the Community

After you set up a community, you must activate the community.

## To activate a community

1. Go to **Setup > Customize > Communities** and click **All Communities**.
2. Click **Workspaces** and under My Workspaces click **Administration**.
3. From the Settings page, click **Activate Community**.

Your community space is now activated.


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# Setting Up the Default Page

After the community is created and activated, you need to set up Default Page for your community.

> ⓘ After deployment, the angular library will provide a Visualforce page that you can set as the default page for all page settings within the community.

## To set up a default page

1. Go to **Setup > Customize > Communities** and click **All Communities**.
2. Click **Workspaces** and under My Workspaces click **Administration**.
3. Click the **Pages** option.
4. From the *Community Home* drop-down, select **Visualforce Page**.
5. Search and select **ECommerce** for your eCommerce template and click **Save**.

# Configuring Sharing Settings

Perform the following steps to configure the **Sharing Setting** for **Default External Access**:

1. Go to **Setup**, in the Quick Find Box, search and select **Sharing Settings**.
2. Click **Edit**.
3. Compare the **Default External Access** with **Default Internal Access** and update the Default External Access with the same option selected as Default Internal Access.
4. Click **Save**.

# Granting User Access to Community via Profiles

You can enable users to access the community through profiles based on the level of access you want to grant. Ensure that you provide access to at least an admin user, community user (e-commerce), and guest user.

## To enable users to access a community

1. Go to **Setup > Customize > Communities** and click **All Communities**.
2. Click **Workspaces** and under My Workspaces, click **Administration,** and select **Members.**


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3. Under the *Select Profiles* section, from the **Available Profiles** column, select respective profiles and add them to the **Selected Profiles** column.
4. Under the *Select Permission Sets* section, from the **Available Permission Sets** column, select respective permission sets and add them to the **Selected Permission Sets** column.
5. Click **Save**.

## Allowing External Users to Self-Register

Perform the following steps to allow the external user to self-register:

1. Go to **Setup > Customize > Communities** and click **All Communities**.
2. Click **Workspaces** and under My Workspaces, click **Administration,** and select **Login & Registration**.
3. Under the *Registration Page Configuration* section, select **Allow external users to self-register**.
4. Click **Save**.

## Publishing Communities

Perform the following steps to publish the community:

1. Go to **Setup > Customize > Communities** and click **All Communities**.
2. Click **Workspaces** and under My Workspaces, click **Builder**.
3. Click **Publish**.

## Setting Up Guest Users

You can set up guest users for your community. The concept of guest users is simply hiding access to certain pages.

### To set up a guest user

1. Go to **Setup > Customize > Communities** and click **All Communities**.
2. Click **Workspaces** and under My Workspaces, click **Administration**.
3. Select **Pages,** select the Force.com section. This section takes you to the underlying site record for your Salesforce community.
4. Under the Site Visualforce Pages section, ensure the pages are listed for the guest user to access. The pages that are not listed cannot be accessed by a guest user.


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5. Once done, click **Public Access Settings** where you can see the guest user profile for our storefront. This displays what a guest user can access and manage object and field-level permissions.
6. Click **Save**.

# Registering a Salesforce Sites Domain

Your company's Salesforce Sites domain is used for all the sites that you create. You must register your company's Salesforce site domain to create public websites and applications that are directly integrated with your Salesforce.com organization—without requiring users to log in with a username and password. Your Salesforce site domain must be unique and must consist of only alphanumeric characters. Salesforce.com recommends using your company's name or a variation of your company's name, such as 'mycompanyportal.'

> ⚠ **You cannot modify your Salesforce site domain name after the registration process.**

## To register your Salesforce Sites domain

1. Go to **Setup** > in the Quick Find Box, search and select **Sites**.
2. Enter a unique name for your Salesforce Sites domain. A Salesforce Sites domain name can contain only alphanumeric characters and hyphens and must be unique in your organization. It must begin with a letter, not include spaces, not end in a hyphen, and not contain underscores or periods.

   > ⚠ You can't modify your Salesforce Sites domain name after you have registered it.

3. Click **Check Availability** to confirm that the domain name you entered is unique. If it isn't unique, you are prompted to change it.
4. Read and accept the Sites Terms of Use by selecting the checkbox.
5. Click **Register My Salesforce Site Domain**.

# Creating Sharing Rules For User And Storefront

Perform the following steps to assign permission sets:

1. Go to **Setup** > in the *Quick Find* box, search and select the **Sites**.


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2. Click the respective **Site Label**. For example, E-Commerce or Partner Commerce.
3. Click **Public Access Settings > View Users.**
4. Click the e-commerce site user. For example, Site Guest User, E-Commerce/Partner Commerce.
5. Under the *Permission Set Assignments* section, click **Edit Assignments.**
6. From the **Available Permission Sets** column, select respective permission sets and add them to the **Enabled Permission Sets** column.
7. Click **Save**.

Perform the following steps to create a sharing rules storefront:

1. Go to **Setup** > in the *Quick Find* box, search and select the **Sharing Settings.**
2. Go to the **Storefront Sharing Rules** section and click **New**.
3. In Step 1, enter the **Label** for the rule name.
4. In Step 2, select **Guest user access, based on criteria** option.
5. Select the respective **Field**, **Operator**, and **Value** to set the criteria. For example, Field: Storefront Name, Operator: Contains, Value: E-Commerce or Partner Commerce.
6. Click **Save**.

Perform the following steps to create the user of a sharing rule:

> ⚠ You must use the **Region** field to create sharing rules for users.

1. Go to **Setup** > in the *Quick Find* box, search and select the **Sharing Settings.**
2. Go to the **User Sharing Rules** section and click **New**.
3. In Step 1, enter the **Label** for the rule name.
4. In Step 2, select **Guest user access, based on criteria** option.
5. Select the respective **Field**, **Operator**, and **Value** to set the criteria. For example, Field: Region, Operator: equals, Value: North Region.
6. Click **Save**.

# Configuring Remote Site Settings for Community URL

Perform the following steps to configure Remote Site Settings for your Community URL:

1. Go to **Setup** > in the *Quick Find* box, search and select the **Remote Site Settings**.
2. Click **New Remote Site**.
3. Enter a descriptive term for the *Remote Site Name*.
4. Enter the URL for the remote site.


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> Go to the **Sites** to get the **Site URL**. For example, http://commercesite.test.force.com

5. Click **Save**.

# Configuring Custom Settings

Perform the following steps to configure Config System Properties:

1. Go to **Setup >** in the *Quick Find Box*, search and select **Custom Settings**.
2. Click **Config System Properties** > **Manage**.
3. Click **System Properties** > **Edit**.
4. Enter the Instance Url. For example, https://commercedomainame.my.salesforce.com
5. Click **Save**.

Follow above all steps to configure **Instance Url** for **Comply System Properties**.

Perform the following steps to configure Config Custom Classes:

1. Go to **Setup >** in the *Quick Find Box*, search and select **Custom Settings**.
2. Click **Config Custom Classes** > **Manage**.
3. Click **System Properties** > **Edit**.
4. In the *Tax Callback Class*, enter **Apttus_Webstore.APTS_TaxCallBack**.
5. Click **Save**.

# Creating Community Users

You can create community users and enable them to access your community.

## To create community users

1. Add a user to an account as a contact record and enable the contact record as a **Customer User** or **Partner User**, depending on your business relationship.
2. Refer to Create Community Users for detailed information.

# Conga Digital Commerce Permission Set

The Digital 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


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users to access the digital 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 from logging in 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**.

Every time you assign Apttus Ecommerce permission set to a user, you MUST assign Apttus Ecommerce Custom permission set as well.

⚠ You must provide CRUD permission to the API Cache object.

For Proposal and Checkout APIs to work seamlessly, you must assign appropriate user permissions to custom fields that you may have added to an object.

## Guest User Access

In newly spun orgs, due to Salesforce upgrade, site guest users do not have access to some user fields like *Alias*. This is fixed by using userType on a user record to generate a token. For new orgs, you must add the following permissions on the storefront object to site guest user at profile level (E-Commerce Profile).

**Object level access** : Read

**Read access on the following fields:**

- Cache Size
- Enable API Filters
- Guest Username
- Guest Password2


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# Enabling State and Country Picklists

Your Digital Commerce site may require State and Country picklists. You must configure these picklists on the org level which enables the State and Country fields to display the picklists on the Contact object.

## To enable state and country picklists

1. Go to **Setup**, in the Quick Find box, search for *State and Country/Territory Picklists,* and click **State and Country/Territory Picklists**. The State and Country/Territory Picklists setup page appears.
2. On the State and Country/Territory Picklists setup page, follow the step-by-step instructions to enable the State and Country picklists.

For complete information, refer to Enable and Disable State and Country Picklists in Salesforce documentation.

# Changing the Collaboration Request Type

From the Spring '21 release, Digital Commerce uses the Collaboration header for creating collaboration request via API and SDK integration to create quotes and orders.

With API integration, the [POST] /collaborationrequests API is used to create collaboration request. Using [POST] /collaborationrequests/:recordId/carts, a cart is generated based on the collaboration request. This method when called copies the header fields from the collaboration request to the cart.

With SDK integration, a cart is created from the UI. You can add products to the cart and then checkout.

> ⚠ If you have added custom fields to the Collaboration object, you must assign appropriate user permissions to the custom fields.

With this, you must also select Digital Commerce from the Collaboration Type field in your Salesforce org.


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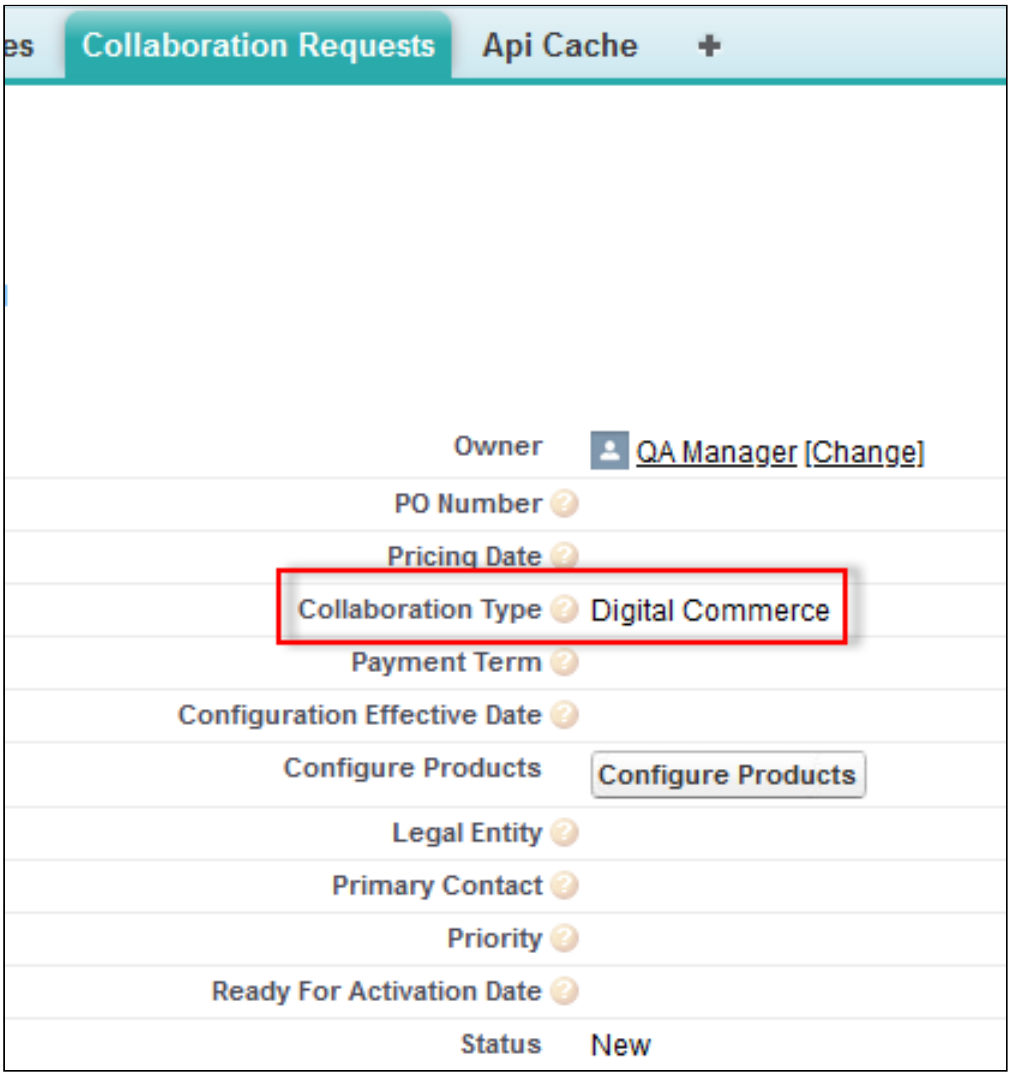


If Digital Commerce is not available as a picklist value in the Collaboration Type field, you must add it manually.

To add the picklist value:

1. Go to the Product Configuration object and from the Custom Fields & Relationships section, click the Collaboration Request field.
2. Scroll down to the Lookup Options related list and from the Related to field, click the Collaboration Request link. The Collaboration Request custom object appears.
3. From the Custom Fields & Relationships section, click the Collaboration Type field.


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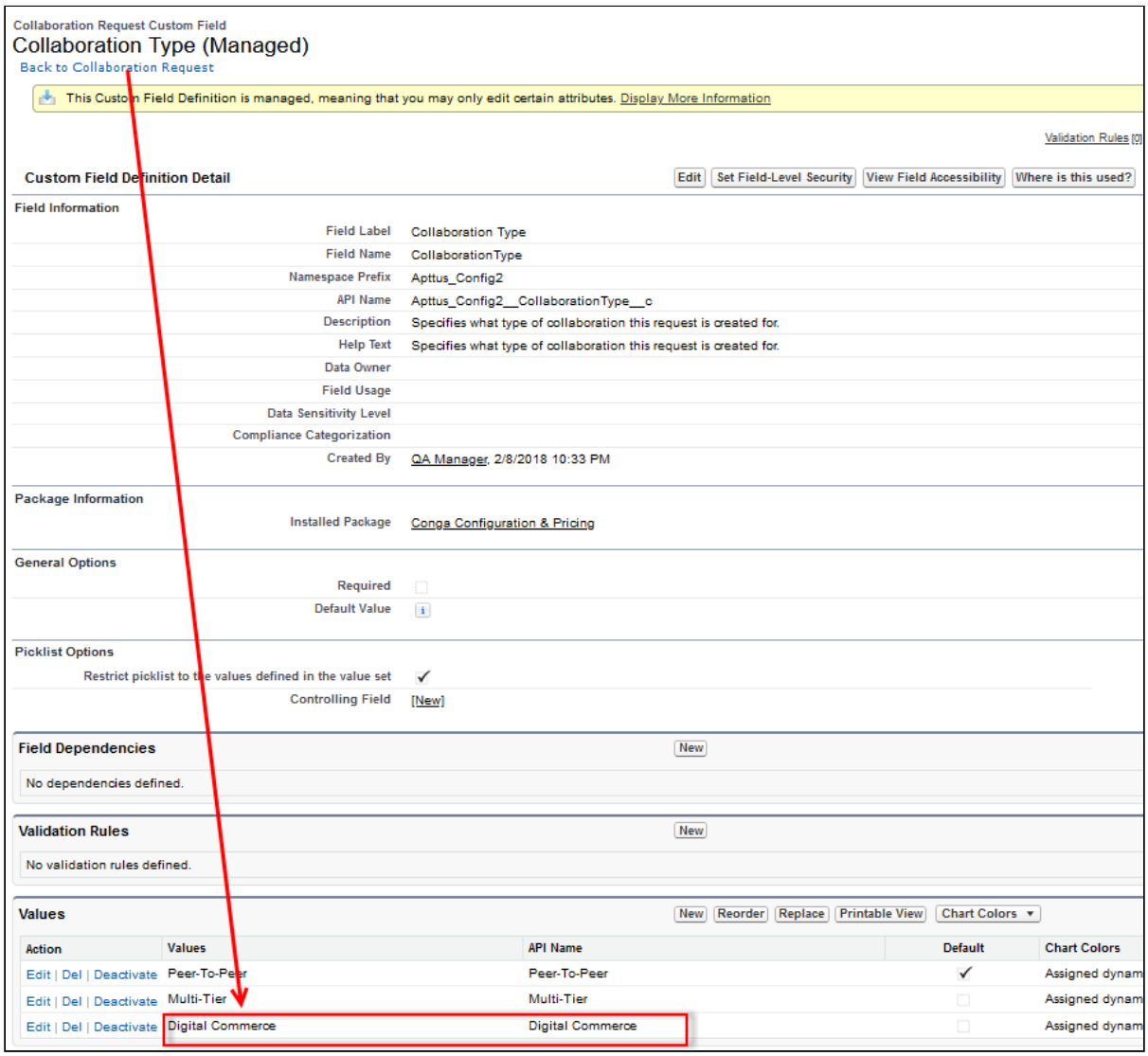
4. Scroll down to the Values related list and add Digital Commerce as a picklist value.




# Adding a Storefront Record

The Store object is created during the deployment process. The Store object is the only supplementary object to the CPQ code. You must create a store record. After installing the managed package, there is no way for you can access the Storefront object. You must add a Storefront tab to access the Storefront object.

Apart from the underlying catalog, the Digital Commerce package comes with a store object and tab to map a storefront to a catalog. If you are using an MDO org, there may already be a 'store' object installed. This object is deprecated in favor of the 'Storefront' object that comes with the Digital Commerce package.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After setting up your catalog, the next step is to create a 'Storefront' record. The storefront object is very basic and contains only a couple of fields to map a storefront to a price list and logo for the guest user. The price list should look up to the price list you want the guest user to access and the logo should 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. Remember the name of the storefront you created. This will be used in a later step to associate with a storefront codebase.

To add a storefront tab

1. Go to **Setup > Create > Tabs** and click **New**.
2. From **Object**, select Storefront.
3. From **Tab Style**, select a style and click **Next**.
4. Click **Next** and click **Save**.

The Storefronts tab is created. You can now create a Storefront record.

## To add a storefront record

1. Click **All tabs** and click **Storefronts**.
2. Click **New**.
3. For **Storefront Name**, type a mandatory name for your storefront.
4. For **Default Locale**, select a locale for the users in the storefront.
5. For **Default Price List**, select a price list. This is the default price list used for guest users in the storefront.

> ⚠ There are three price list parameters that can be set in the application:
> - Using API headers.
> - Logged in User must be associated with Contact and Account object that has a price list.
> - Storefront account and price list.

6. For **Default Account for Guest Users**, type an account name as the default account for orders placed by guest users from E-Commerce.
7. For **Translation URL**, type the URL to retrieve the translation custom labels for the storefront.
8. For **Payment Callback URL**, type the payment callback URL.
9. For **Guest Username** and **Guest Password2**, enter a username and password. The user details entered must have the alias as ***guest***.


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> **Important**
>
> **Configuration Layout** field is deprecated and is no longer functional. There is only one component called Product Configuration component. The earlier Native Configuration component is renamed to Product Configuration component.

10. To enable cart revalidation after making changes to the product configuration, select **Enable Cart Revalidation**. For more information, see Revalidating the Product Configuration in Digital Commerce.
11. To enable Asset Based Ordering capabilities for your storefront, select **Enable ABO**.
12. If you enabled Asset Based Ordering, use the **Asset Actions** field to enable them for your storefront.
13. To enable request quote capabilities for the storefront, select **Enable Request Quote**.
14. **Cache Size** is a read-only field specifying the number API cache left behind after clearing the API cache.
15. To enable tax integration, select **Enable Tax Calculations**.
16. To set the purpose of the storefront, select the relevant **Channel Type**.
17. To enable Promotion capabilities for your storefront, select **Enable Promotions**.
18. For **Logo**, use Notes and Attachments to attach an image file. Copy and paste the image ID in the Logo field to reference the image. You can also type a URL to reference an externally hosted logo image.
19. For **Enable API Filters**, by default, this flag is set to True. To override global filters, you must set this flag to False. For more information, see Enabling API Filters.
20. Click **Save**.

# Adding Storefront Promotional Banners

Storefront Banners are custom objects that are deployed with the managed package. You can add as many banners as you want.

## To create storefront banners

1. In the Storefront record, from the Storefront Banners related list, click **New Storefront Banner**.
2. The Storefront field is auto-populated.
3. Enter the following information:


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| Field | Description |
| --- | --- |
| Title | Title for the banner. |
| Subtitle | Subtitle or sub heading for the banner. |
| Link | Specify the page that opens, when clicked. |
| Image | This field references a custom id or a URL. |

4. From **Currency**, select a mandatory currency for your storefront banner.
5. Click **Save**. The Storefront Banner details page appears.

### To add an image to the Storefront Banner

1. In the Storefront record, from the Note & Attachments related list, click **New Note**.
2. For **Title**, enter a title of the Banner image.
3. Click **Save**.
4. Click **Attach File** to attach a banner image and follow the instructions.

## Managing Permissions for Secure Guest User Access to Storefront

Salesforce Winter 2020 introduced several security alerts, which add default security to the records that power a storefront and therefore restrict what guest users can access on the storefront.

- An optional sharing setting, **Secure guest user record access**, is available that affects guest user access in the following ways:
    - Changes the organization-wide default (OWD) external access settings to apply only to community users. By default, guest users have no access to any records used for the storefront.
    - Adds a sharing rule type, **Guest user access, based on criteria**, which can grant only Read access to records, based on criteria you specify.
    - Restricts guest users from being included in public groups.
    - Restricts records from being manually shared with a guest user.
- An optional Communities setting, **Reassign new records created by guest users to the default owner**, is available that restricts a guest user from owning any Object records, such as Apttus_Config2__ProductConfiguration__c. This means that, after


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enabling the setting, a guest user can only view or add to a cart created *before* the setting was enabled, and cannot create a cart.
- An optional Communities setting, **Let guest users see other members of this community**, is available that is disabled by default. This setting does not affect any storefront functionality.
- The View All Users permission is disabled by default for any new org.

To resolve this, security alerts are *mandatory* since February 2020. The security alerts are opt-in until that date.

## Guest User Access

If you allow guest users to perform any of the following tasks, we recommend that you install the appropriate patch for your version of Digital Commerce and immediately complete the following required workaround steps to maintain guest user access on your storefront.

- Self-register
- Browse your storefront
- Add products to a cart
- Complete checkout

The solution for all versions of Digital Commerce involves creating a dedicated licensed user to act on behalf of the guest users for a storefront. The standard Community guest user can still be used, however, those users cannot perform the actions mentioned above.

In newly spun orgs, due to Salesforce upgrade, site guest users do not have access to some user fields like *Alias*. This is fixed by using userType on a user record to generate a token. For new orgs, you must add the following permissions on the storefront object to site guest user at profile level (E-Commerce Profile).

**Object level access** : Read

**Read access on the following fields:**

- Cache Size
- Enable API Filters
- Guest Username
- Guest Password2

## To maintain guest user access on your storefront

1. Click All tabs and click Storefronts.


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2. In the Storefront record, enter the Guest Username and Guest Password for the guest user account. These fields are used for all guest users.

3. Assign the Digital Commerce permission set to the user you created in Step 2. This grants access to the various objects and fields necessary to perform the actions within the storefront.
4. Add a remote site setting with your community URL as the approved domain.
5. Create storefront sharing rules to allow the guest user to read the username and password from the storefront object for the guest user.

**Important**

Create all the above-mentioned sharing rules for both Digital Commerce and Partner Commerce storefronts.

# Enabling API Filters

Digital Commerce contains headless APIs, which are used from the SDK and can be used independently too. The Query API accepts JSON input with filters, conditions, fields, lookups, and relationships for an object to fetch records. Implementing Digital Commerce applies global filters by default. You can bypass and override global filters by setting the Enable API Filters flag to False from the Storefront object. By default, this flag is set to True.

**Important**

Disabling global filters disables all the filters across the application. For using filters of your choice, you must explicitly pass appropriate parameters.

The following global filters are applied:

| API | Version | Condition |
|---|---|---|
| carts | All | OwnerId = Current User Id |


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| API | Version | Condition |
|---|---|---|
| carts | All | Account = Current Account |
| carts | All | PriceListId = Current Price List |
| carts | 3 | BusinessObjectId != null |
| carts | 3 | BusinessObjectType != null |
| products | All | IsActive = true |
| products | All | Has a valid price list item in the current price list (price list item inherits price list item filters) |
| pricelistitems | All | Effective Date == null OR Effective Date <= TODAY |
| pricelistitems | All | Expiration Date == null OR Expiration Date >= TODAY |
| pricelistitems | All | Active = true |
| pricelistitems | All | PriceListId = Current Price List |
| pricelistitems | All | ListPrice != null |
| quotes | All | OwnerId = Current User Id |
| quotes | All | Account = Current Account |
| quotes | All | Primary_Contact = Current User Contact Id |
| assets | All | AccountId = Current Account |
| categories | All | IsHidden = false |
| categories | All | Hierarchy.Type = 'Offering' OR Hierarchy.Type = 'Both' |


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| API | Version | Condition |
|---|---|---|
| categories | All | AncestorId != null OR PrimordialId = null |
| categories | All | IsLeaf = No OR ProductCount > 0 |
| orders | All | OwnerId = Current User Id |
| orders | All | SoldToAccountId = Current Account Id |
| orders | All | PrimaryContactId = Current User Contact Id |

# Payment Integration with Cybersource Payment

You can use Cybersource Payment Gateway with Digital Commerce to perform payments. This section describes how you can integrate Cybersource Payment with Digital Commerce.

**Prerequisite**

You must have already installed the CPQ and Billing Management packages.
You must have the ***Apttus eCommerce Cybersource*** permission set.

The following four Billing objects store record entries that are used by the Cybersource unmanaged package for every transaction.

| Object Name | Purpose |
|---|---|
| Payment | When a transaction is successfully completed with a success message, a new entry is made in the Payment object with regards to the order. |
| Payment Method | This object stores the data for saving payment detail for future use. |
| Gateway Transaction | This object creates a new record every time a payment request to Cybersource is sent and updates the status when a response is received. |
| Gateway Communication | This is a child object of Gateway Transaction. This object creates a new entry for each request and response payload. |


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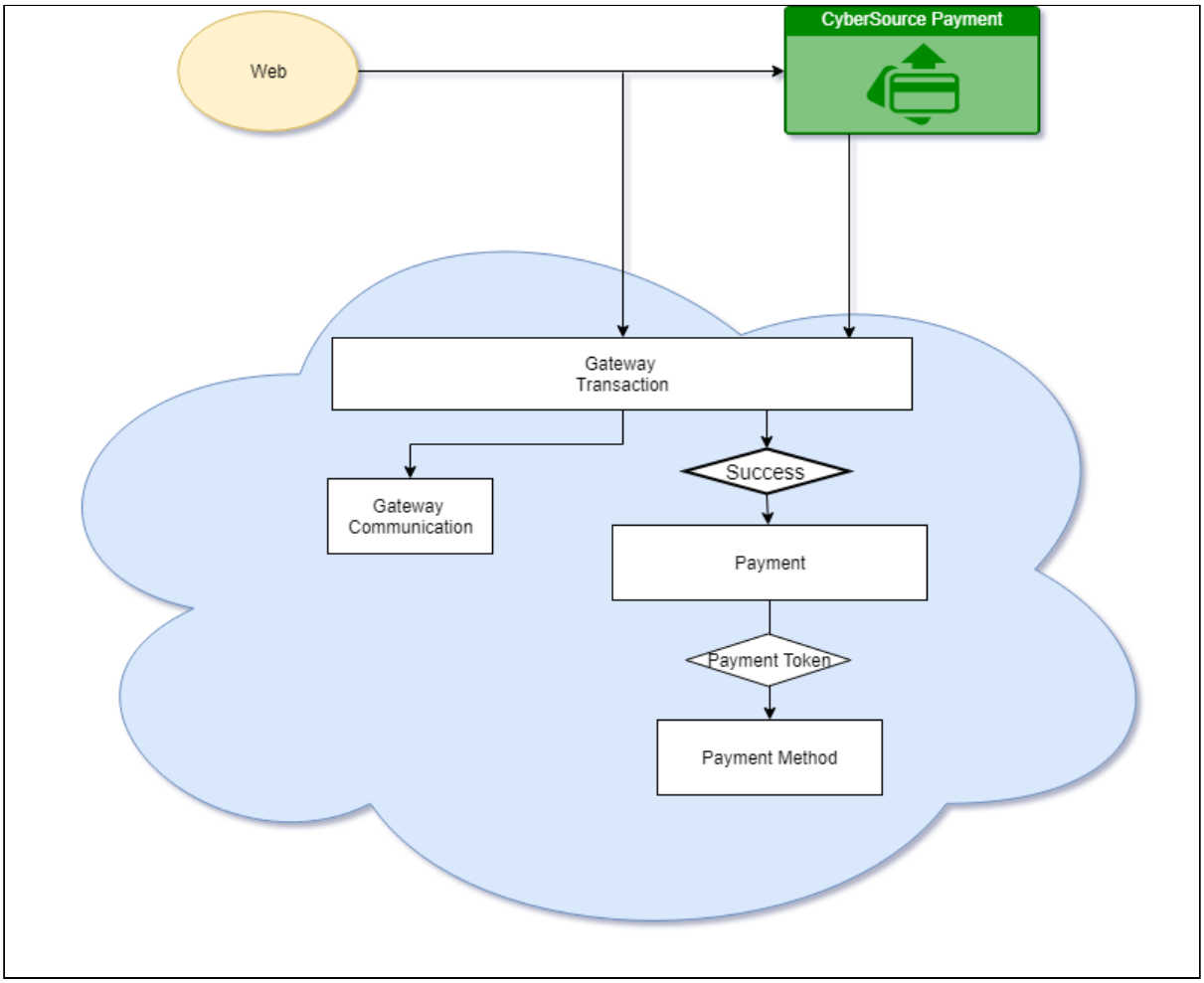
The following diagram illustrates the relationship of Salesforce objects:




## To implement payment integration using Cybersource

1. Download and install the Cybersource unmanaged package from the repository. This package includes all the related objects, labels, classes, and permissions with some rest API resources. Based on these resources the payment integration is executed through classes.
2. You must create a Cybersource account with the following two Secure Acceptance profiles.
    a. Hosted API - This is used to display IFrame in your Digital Commerce site.
    b. Checkout API - This is used to perform transactions by using the payment method in a silent way.
    c. Set up Payment Integration using Cybersource.
3. Create profiles in the APTS Cybersource Profile Details custom setting. This custom setting is part of the unmanaged package.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4. Define custom labels for the Hosted profile and Checkout/Silent Order Post profile.

# Creating a Cybersource Account with the Secure Acceptance Method

To integrate the Cybersource payment gateway, you must create a Cybersource account and create your own profile under a secure acceptance setting.

> **Prerequisite**
>
> You must subscribe for a Cybersource subscription account using the https://ebc2.cybersource.com/ebc2/registration/external link.

## Creating Profiles Under Secure Acceptance Setting

Perform the following steps to create profiles under secure acceptance setting:

1. Log in to your Cybersource account using https://ubctest.cybersource.com/ebc2 link.
2. From the Dashboard, under **Payment Configuration**, select **Secure Acceptance Setting**.
3. From the **Secure Acceptance Setting** page, click **New Profile**. The Create Profile panel appears.
4. Enter the profile name and description, the company name, the integration method used to process notifications and the contact to whom they will be sent, and any additional services. This information is available in the General Information tab after you create the profile.

   > ⚠ The integration method cannot be changed later.


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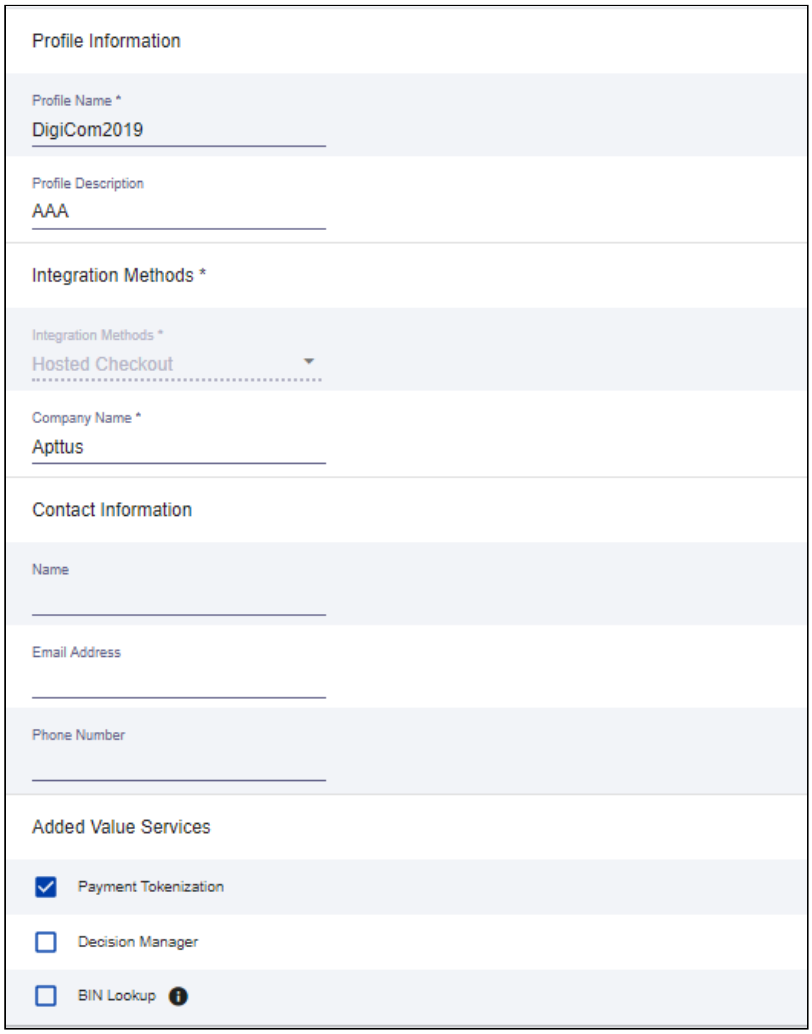


5. Click **Submit**. The Create Profile panel closes and the Edit Profile page appears.

The profile is created as "Inactive." You can complete profile values to promote it using the steps in **Editing Secure Acceptance Profiles** at any time.

## Editing a Secure Acceptance Profile

You must make changes to an inactive profile, then promote the changes to the active profile.

1. On the left navigation pane, click the **Payment Configuration** icon.
2. Click **Secure Acceptance Settings**. The Secure Acceptance Settings page appears.
3. Click the **Inactive Profiles** tab.
4. In the Profile Name column, click the name of the profile you want to edit. The Edit Profile page appears.
   You can also select an Active profile, and click the **Edit** icon. Business Center automatically takes you to the Inactive version of the profile.


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5. Click the tab containing the information you want to update and make changes as necessary.

| Tab Name | Description |
|---|---|
| General Information | Enter basic information about the name and format of the profile. |
| Payment Settings | Select accepted card types, checkout methods, and reversal preferences. |
| Security | Generate the access key and security key that you need to pass for the transaction. |
| Payment Form | Set up checkout steps, and which fields to include in billing and order review forms. |
| Notifications | Designate where to send transaction data. |
| Customer Response | Customize response and error messages. |
| Branding (Optional) | Add your branding logos, fonts, and colors. |

6. When you are done, click **Save**.
7. Click the **Promote Profile** icon to add changes to the Active profile.

## Defining Payment Methods

After creating a profile, perform the following steps to configure payment methods.

1. From the **Edit Profile** page, go to the **Payment Settings** tab.
2. Click **Add Card Types** to add cards of your choice.

> ⚠ If you want to use Electronic Check (eCheck) or Pay Pal method, you must raise a support ticket first with Cybersource. Cybersource implements your requirement, post which eCheck and Pay Pal options are displayed. You can also select account types as per your requirement.

3. Select the **3DS1** option under the Payment Authentication 3DS Version section.
4. Select both the options (**Fails AVS Check** and **Fails CVN Check**) under the Automatic Authorization Reversal section.


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5. Click the setting icon next to the card type to add supported currencies and required fields. The card setting page appears.

   > ⚠ The default currency is US Dollars (USD). To add more currencies, you must raise a support ticket with Cybersource.

6. Select the options of your choice and click **Submit**.

## Creating Access and Security Key

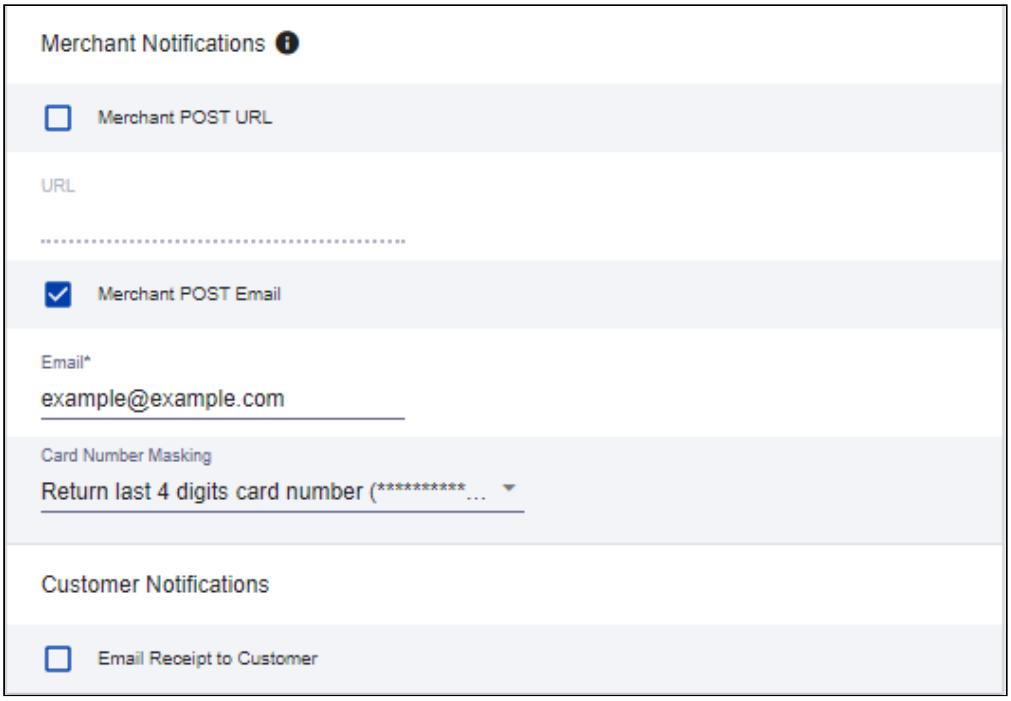
Perform the following steps to create your access key and security key that is needed for transactions:

1. From the **Edit Profile** page, go to the **Security** tab.
2. Click the **Create** icon.
3. Enter a **Key Name** and click **Create**.

An access key and security key is generated. You must enter the keys in the *APTS_CyberSource_Profile_Details__c* Cybersource custom setting.

## Configuring Transaction Responses

You can configure transaction responses from the **Notification** tab. You can define whether to receive responses through email or a post on API. Currently, Email notifications are supported.





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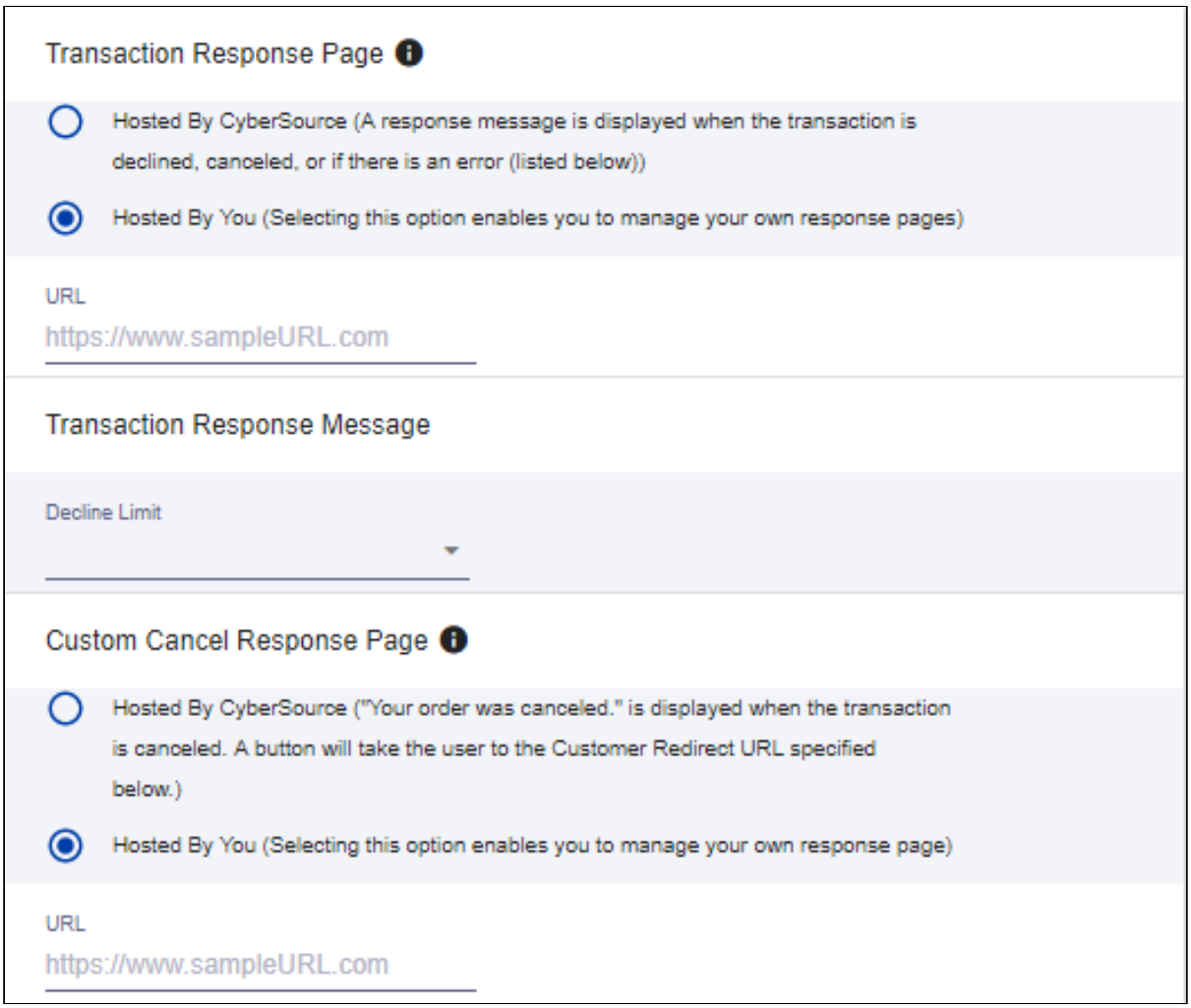
## Configuring Customer Responses

The customer response setting allows you to configure the redirect page after the transaction is completed/canceled.




# Configuring the Payment Form

You must configure your CyberSource secure acceptance page from the Payment Form tab.

1. From the Edit Profile page, go to the **Payment Form** tab.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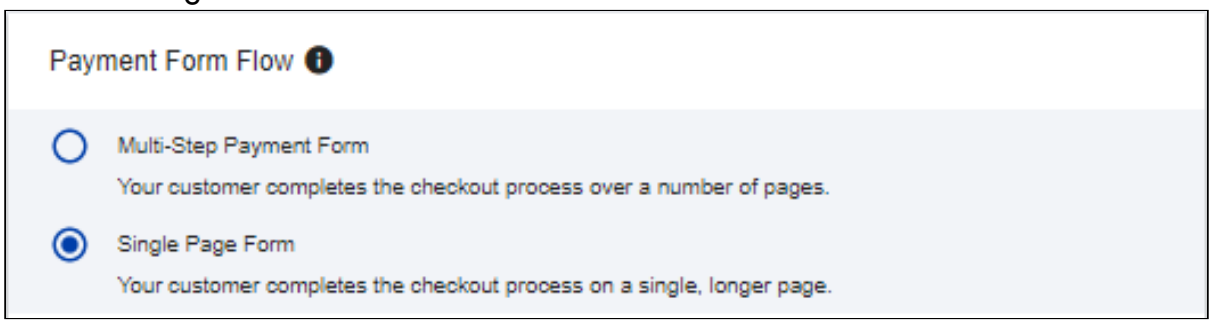
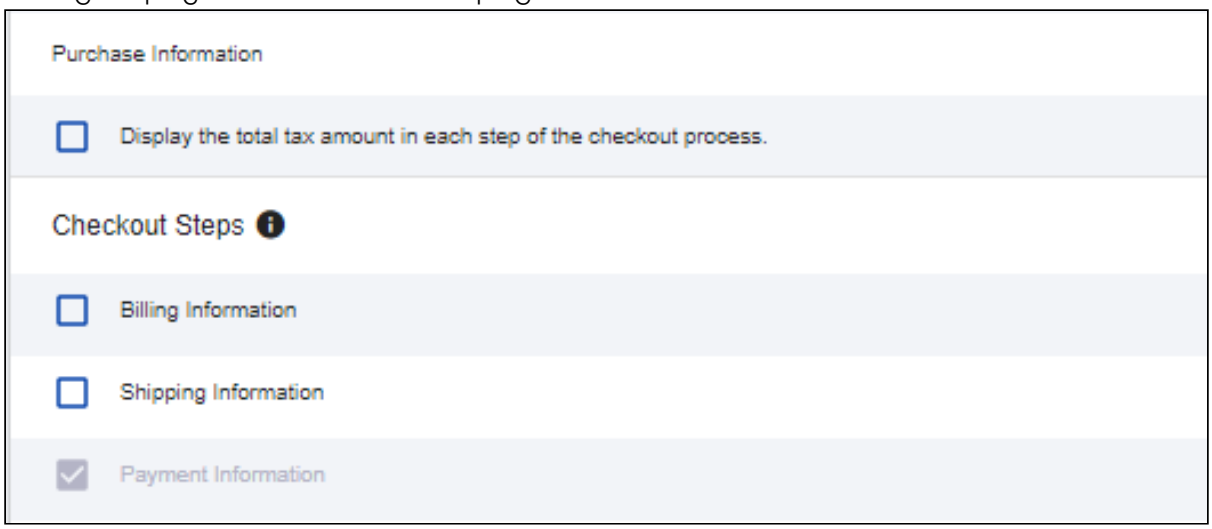
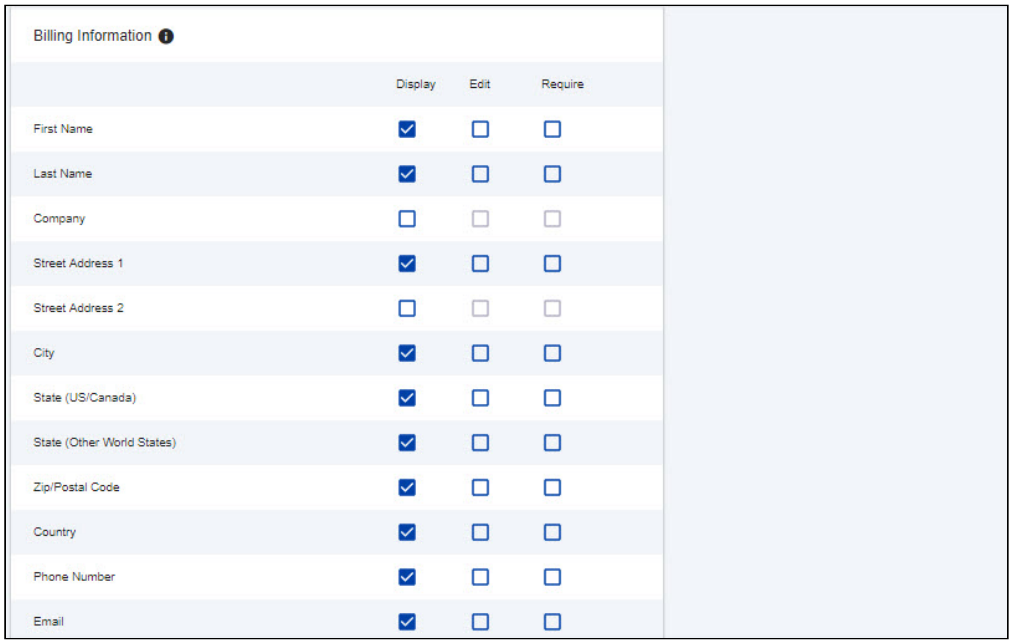
2. Select the **Payment Form Flow**.




3. Configure payment and checkout page information.




4. Select the fields to display on the billing page. Select the **Display** checkbox corresponding to each field to display it on the billing page. You can also mark some fields as required by selecting the **Require** checkbox corresponding to that field.





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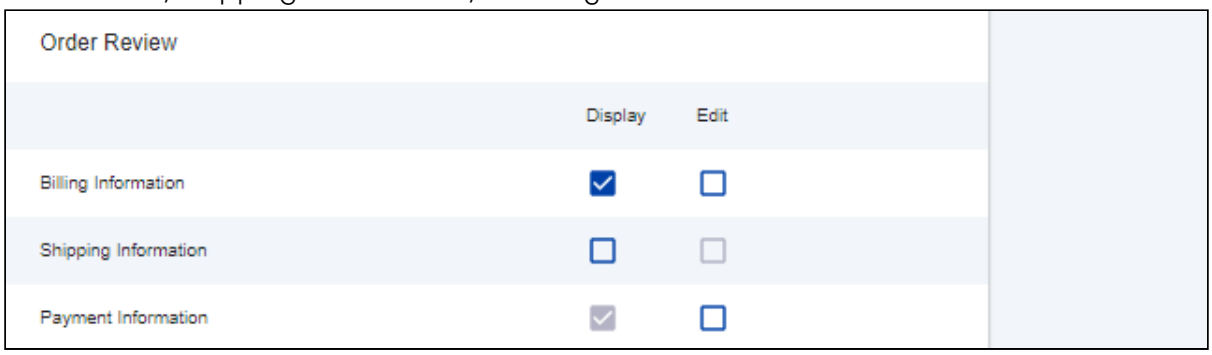
5. Select the fields to display on the eCheck page. Select the **Display** checkbox corresponding to each field to display it on the billing page. You can also mark some fields as required by selecting the **Require** checkbox corresponding to that field.

6. Select the settings to show on the order review page. You can show the Billing Information, Shipping Information, and Payment Information.




7. Click **Save**.

# Creating Profiles in Custom Settings

After you configure the Cybersource settings, you must create profiles in the APTS CyberSource Profile Details custom settings. The Cybersource unmanaged package includes a Cybersource custom setting named APTS_CyberSource_Profile_Details__c. This custom setting stores the access_Key, Secret_Key, and Profile ID from Payments. You must create two records in the custom settings, one for the hosted profile and another for the checkout profile.

## To create a hosted profile in a custom setting

1. Go to **Setup** > **Develop** > **Custom Settings** and click **Manage** for APTS CyberSource Profile Details.
2. Click **New**.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3. Enter the **Name** for the profile. For example System Properties.
4. Enter the **Access Key** that you generated in the Security tab in Cybersource.
5. Enter the **IFram URL** provided by Cybersource during the subscription.
    - For Test Transactions, you must use https://testsecureacceptance.cybersource.com/embedded/pay
    - For Live Transactions, you must use https://secureacceptance.cybersource.com/embedded/pay or the URL provided by Cybersource.
6. Enter the **Merchant ID**. The merchant ID is the same as the Organization ID that you used to create the Cybersource account.
7. Enter the **Profile ID**. You will receive the Profile ID when you create a secure acceptance profile.
8. In Secret Key1 and Secret Key2, enter the secret keys that you generated in the Security tab in Cybersource.

    ⚠ Due to the Salesforce limitation of 250 characters, the secret key is divided into two fields. You must manually break the key into two and enter these fields. You must ensure that there are no extra spaces at the beginning or, the end of the secret key.

9. If you are using a test environment, select **Is TestEnvironment**.

    ⚠ Checking this flag sets the default order amount to $100 as Cybersource may display an error for amounts exceeding $100 in test environments.

10. Click **Save**.

## To create a checkout profile in a custom setting

1. Go to **Setup** > **Develop** > **Custom Settings** and click **Manage** for APTS CyberSource Profile Details.
2. Click **New**.
3. Enter the **Name** for the profile. For example Silent Checkout Profile.
4. Enter the **Access Key** that you generated in the Security tab in Cybersource.
5. Enter the **Iframe URL** provided by Cybersource during the subscription.
    - For Test Transactions, you must use https://testsecureacceptance.cybersource.com/silent/embedded/pay
    - For Live Transactions, you must use https://secureacceptance.cybersource.com/silent/embedded/pay or the URL provided by Cybersource.

    a. Enter the **Merchant ID**. The merchant ID is the same as the Organization ID that you used to create the Cybersource account.


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6. Enter the **Profile ID**. You will receive the Profile ID when you create a secure acceptance profile.
7. In Secret Key1 and Secret Key2, enter the secret key that you generated in the Security tab in Cybersource.

   > ⚠ Due to the Salesforce limitation of 250 characters, the secret key is divided into two fields. You must manually break the key into two and enter in these fields. You must ensure that there are no extra spaces at the beginning or, the end of the secret key.

8. If you are using a test environment, select **Is TestEnvironment**.

   > ⚠ Checking this flag sets the default order amount to $100 as Cybersource may display an error for amounts exceeding $100 in test environments.

9. Click **Save**.

### To configure the callback URL for Payment Iframe in the custom settings

1. Go to **Setup > Develop > Custom Settings** and click **Manage** for APTS CyberSource Profile Details.
2. Click **System Properties**.
3. Enter the **Payment Callback URL**,  to redirect the customer to the Digital Commerce application after payment is done.
4. Click **Save**.

## Defining Custom Labels

The Cybersource unmanaged package comes with two labels where you must enter the custom setting profile you created. These labels use relevant values while performing payment transactions.

### To define custom labels

1. Go to **Setup > Create > Custom Labels** and click **Edit** for cyberSource_Active_CustomSetting.
2. Enter a short description.
3. In **Value**, enter the name for the hosted profile you created in the APTS CyberSource Profile Details custom setting. For example System Properties.
4. Click **Save**.


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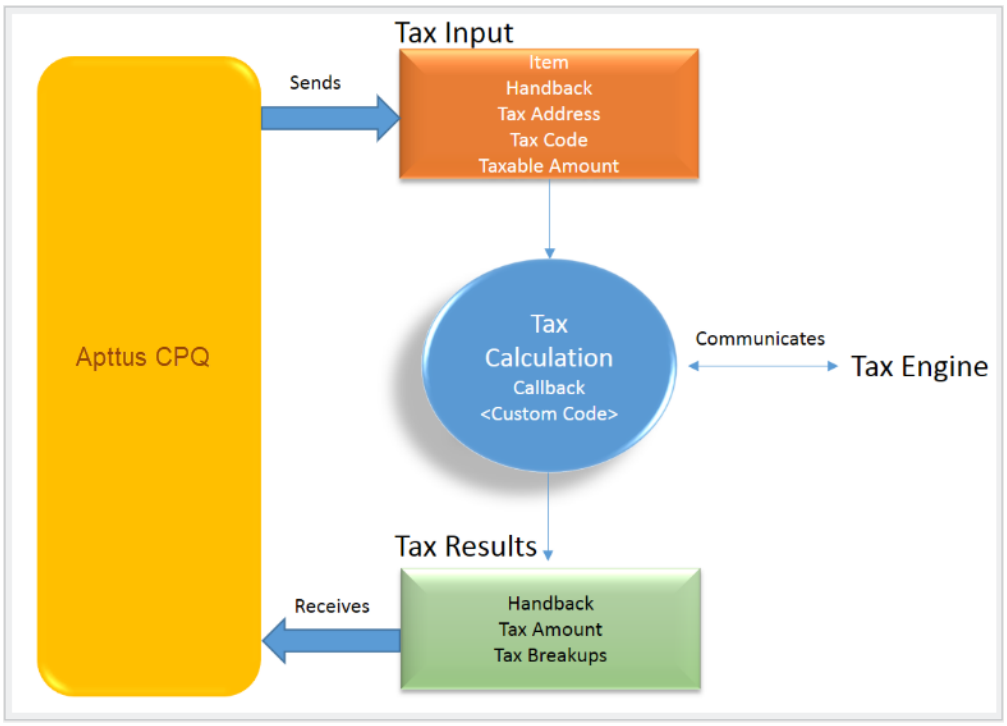
5. Now to go to **Setup > Create > Custom Labels** and click **Edit** for cyberSource_Active_Silent_CustomSetting.
6. In **Value**, enter the name for the checkout profile you created in the APTS CyberSource Profile Details custom setting. For example Silent Checkout Profile.
7. Click **Save**.

# Tax Integration with Avalara Tax Engine

You can communicate with a Tax Engine of your choice with the help of a Tax Callback class. For this, you should know the Request Fields that are sent to Callback and further to the Tax Engine. The following diagram gives an overview of how information is sent from the Product to the Tax Engine and received back after processing.

**Tax Engine**




Tax input is a container that holds the following fields:

- **Item:** Contains an Invoice Line Item or a Credit Memo Line Item.
- **Handback**: A generic wrapper class that can be used to pass an additional field value. Set the value for this field to *TaxInputRelatedObjects*. This class contains the parent Invoice or Credit Memo based on whether the item contains an Invoice Line Item or a Credit Memo Line Item.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- **Tax Address**: The address specified as the Shipping Address of the Ship-To account. If there is no Shipping Address mentioned in the Ship-To account, then the Billing Address of the Ship-To account is used.
- **Tax Code:** This value is taken from the product Price Line Item (PLI).
- **Taxable Amount**: This is the amount to apply the tax to.

When communicating with a Tax Engine, you must note that:

- The implementation of the Tax Callback must return a *TaxResultHandback* object in the *Handback* field of a Tax Result.
- The implementation of the Tax Callback must determine a *commit mode* by checking if the status of the Invoice is *Approved Pending.*

You must register a **Tax Callback class** which is called for tax calculation on invoice generation.

# Setting Up Tax Integration

> **Prerequisite**
>
> You must have already installed CPQ packages.

To set up tax integration, you must complete the following tasks:

- Install the tax integration package and define the class in custom settings
- Enable tax calculations
- Create Tax Code and Tax Certificate
- Set up Tax Calculations
- Set up Tax Breakups

## To set up tax integration with Avalara tax engine

1. Download and install Avalara Tax Integration with Ecommerce unmanaged package from the repository.
2. Go to **Custom Settings** and click **Manage** for Config Custom Classes.
3. Click **New**.
4. Enter the **Name** as *System Properties*.
5. In Tax Callback Class, enter APTS_APTSTaxCallBack. This class is part of the Avalara Tax Integration with the Ecommerce unmanaged package.
6. Click **Save**.


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## To enable tax calculations

1. Go to the **Storefronts** tab. Choose and click your storefront name to open your storefront record.
2. Click **Edit** and set the **Enable Tax Calculations** flag to True.
3. Click **Save**.

In Digital Commerce at the time of Quote creation or Order generation tax needs to be calculated for taxable line items or order line items. You must create a Tax Code and a Tax Certificate record.

## To create tax code and tax certificate record

1. Go to the **Tax Code** tab and click **New**.
2. Enter a **Name** for the tax code.
3. In **Code,** enter the tax code provided by Avalara.
4. Enter a meaningful **Description** for the tax code.
5. Click **Save**. You can define this code in your price list item.
6. Go to the **Tax Certificate** tab and click **New**.
7. Enter a **Number** for the tax certificate.
8. Enter a meaningful **Description** for the tax certificate.
9. Select the **Effective Date** and **Expiration Date** for the tax certificate.
10. Click **Save**. You can define the newly created tax certificate in your Account object.

By default, not all products are taxable. To make a product taxable, you must set the **Taxable** flag to *True* and enter the tax code on the Price List Item.

## To set up tax calculation

1. Go to the **Price List Item** for the line item you want to calculate the tax for.
2. Set the **Taxable** flag to *True* and enter the **Tax Code.**
3. Click **Save.**

In Digital Commerce, when you select a product that is taxable and you request a quote, the system calculates the tax and displays it into the cart. The breakup of the tax is defined in Salesforce from the line item level. The percentage of the tax breakup is passed on from Avalara. The mechanism here is that the API picks the account address and passes it to Avalara. Based on the region/address, Avalara passes tax percentage information which is then computed in Salesforce and displayed in the Tax Breakup object. Refer to the image below for the type of tax breakups populated on the Digital Commerce site.


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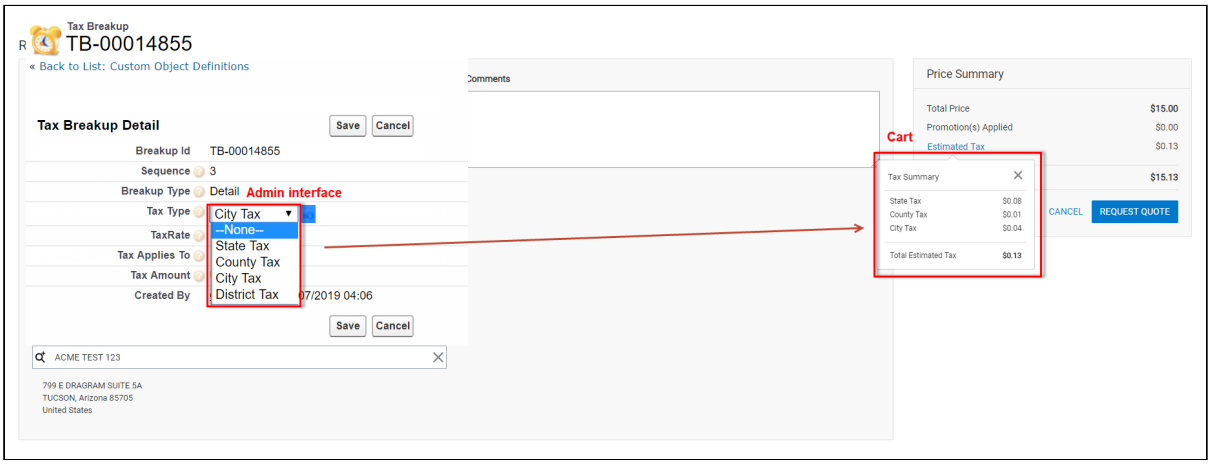
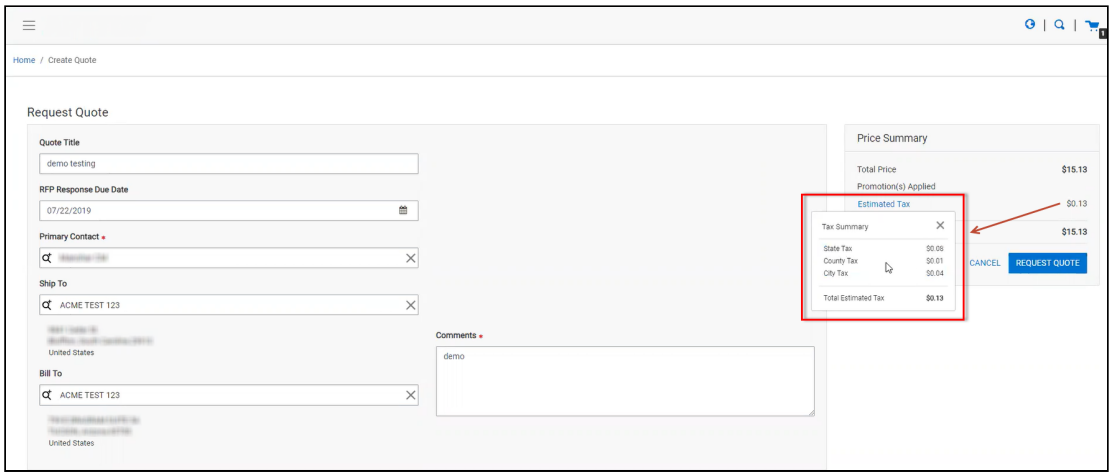



Now when the order is generated, you get order tax breakup for orders and proposal tax break up for proposals. These tax breakups are attached to respective line items.

You must ensure that the Account object has a valid Billing and Shipping Address and the Tax certificate is defined.

**Use Case:**

1. From the Product Catalog, select a **Product** and add it to the cart.
2. Click **Request Quote**. The Request Quote page appears.
   Tax for the selected product is calculated and displayed.
3. To view the tax break up, click **Estimated Tax**.




4. You can either Place an Order or Request a Quote. If you Request a Quote, you can view the tax summary from **My Accounts > Quotes**. If you place an order, you can view the tax summary from **My Accounts > Orders**.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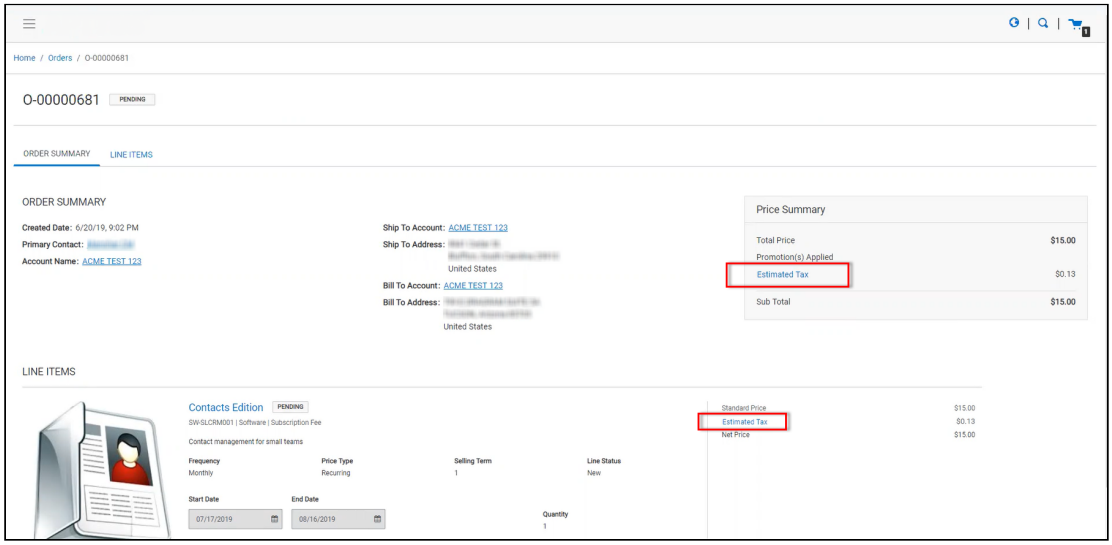


# Setting Up Multi-Language Using Translations

You can set up multi-language support for your site. You have the following three ways to achieve this:

- Translations from the SDK
- Translations from Salesforce
- Translations using Translation Workbench

Translation can be set up for the following:

- Static Labels or text (Page Titles, Header, Footer, Tabs, Descriptions)
- Field Label translations
- Data translations (product, category, product attribute group)

The default language is English. You can set a different language from the User Profile.

## To set a 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). This is optional.
4. In Language, select your preferred language for the user. For example Spanish.
5. Click Save.

For every new locale that you add, you must register it from the template. For more information, see Adding a New Locale.


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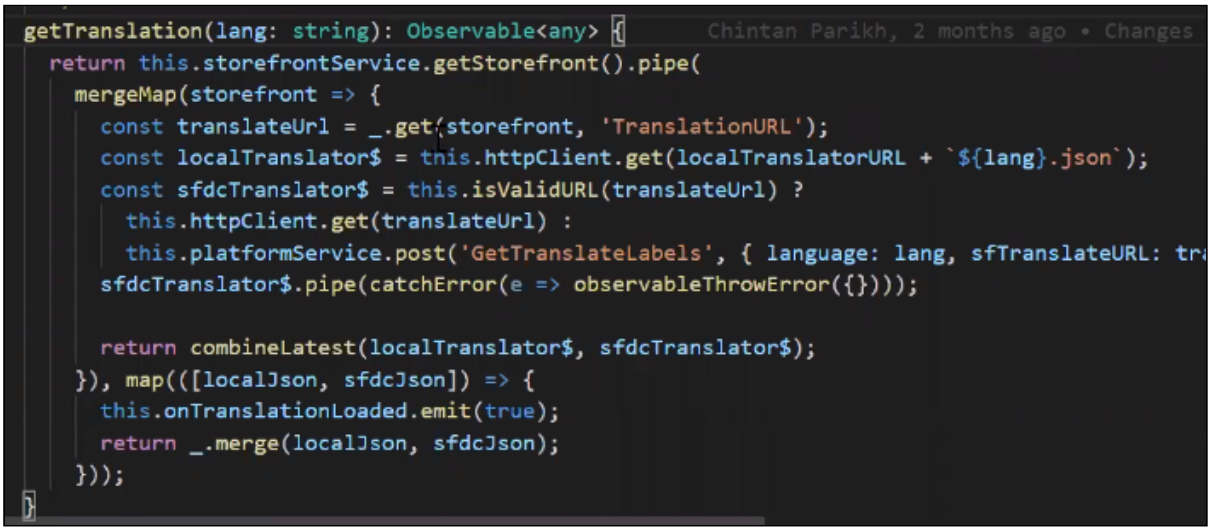
# Setting Up Translations using SDK

The managed package consists of a Translator Loader. This Translator loader contains a folder named assets > i18n that consists JSON files used to define translations. By default, only the English language (en_US.json) is packaged with the base template. In order to add more languages, you can clone the English language JSON file and modify it to accommodate your preferred language. In the translator-loader.service.ts file, the translation GET method checks for the translation URL from the Storefront record. Priority is set to check if the Translation URL is defined on the Storefront object. If not, the system checks for the files in the SDK. The system selects the URL from the local JSON files. If both, the Storefront and the SDK, do not have the URL, the system sets the default language to English. Refer to the GET method code snippet. If the translation URL is not present on the Storefront object, the system uses SDK to translate labels, fields, and data.



```
getTranslation(lang: string): Observable<any> {        Chintan Parikh, 2 months ago • Changes
  return this.storefrontService.getStorefront().pipe(
    mergeMap(storefront => {
      const translateUrl = _.get(storefront, 'TranslationURL');
      const localTranslator$ = this.httpClient.get(localTranslatorURL + `${lang}.json`);
      const sfdcTranslator$ = this.isValidURL(translateUrl) ?
        this.httpClient.get(translateUrl) :
        this.platformService.post('GetTranslateLabels', { language: lang, sfTranslateURL: tr
      sfdcTranslator$.pipe(catchError(e => observableThrowError({})));

      return combineLatest(localTranslator$, sfdcTranslator$);
    }), map(([localJson, sfdcJson]) => {
      this.onTranslationLoaded.emit(true);
      return _.merge(localJson, sfdcJson);
    }));
}
```

# Setting Up Translations Using Salesforce

The translation URL must be present on the Storefront record. Go to the **Storefront record > Translation URL = /apex/APTS_EcommerceTranslation**. This URL points to a static page that contains all the translations. See example code snippet.

**Example Code Snippet for E-Commerce Translation**

```
<apex:page contentType="application/json; charset=utf-8" language="{!
$CurrentPage.parameters.language}">

{
```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```
  "ERROR": {
    "MIN-OPTIONS": "{!$Label.eCom_MIN_OPTIONS}",
    "CART": {
      "TOO_MANY_ATTEMPTS": "{!$Label.ecom_TOO_MANY_ATTEMPTS}",
      "PRICE_CHANGE": "{!$Label.eCom_PRICE_CHANGE}",
      "PRICE_CHANGE_TOASTR_TITLE": "{!$Label.eCom_PRICE_CHANGE_TOASTR_TITLE}"
    },
    "APPLICATION_ERROR_TOASTR_TITLE": "{!$Label.eCom_APPLICATION_ERROR_TOASTR_TITLE}"
  },
  "SUCCESS": {
    "CART": {
      "ITEM_ADDED_TOASTR_MESSAGE": "{!$Label.eCom_ITEM_ADDED_TOASTR_MESSAGE}",
      "ITEM_ADDED_TOASTR_TITLE": "{!$Label.eCom_ITEM_ADDED_TOASTR_TITLE}"
    }
  },
  "ASSETS": {
    "CHANGECONFIGURATION_SUCCESS": "{!$Label.eCom_Assets_ChangeConfigurationSuccess}",
    "CHANGECONFIGURATION_START_DATE": "{!
$Label.eCom_Assets_ChangeConfigurationStartDate}",
    "CHANGECONFIGURATION_END_DATE": "{!
$Label.eCom_Assets_ChangeConfigurationEndDate}"
  },
  "MY_ACCOUNT": {
    "LAST_LOGIN_DATE": "{!$Label.eCom_LAST_LOGIN_DATE}"
  },
  "BUTTON": {
    "Change Configuration": "{!$Label.eCom_Button_ChangeConfiguration}"
  },
  "PRODUCT_CARD": {
    "INSTALLED_PRODUCT": "{!$Label.eCom_PRODUCT_CARD_INSTALLED_PRODUCT}",
    "STANDARD_PRICE": "{!$Label.eCom_PRODUCT_CARD_STANDARD_PRICE}"
  },
  "PAGINATION": {
    "FIRST": "{!$Label.eCom_PAGINATION_FIRST}"
  },
  "COMMON": {
    "ORDERS": "{!$Label.eCom_COMMON_ORDERS}",
    "USERNAME": "{!$Label.eCom_COMMON_USERNAME}",
    "QUANTITY": "{!$Label.eCom_COMMON_QUANTITY}",
    "CHANGE_CONFIGURATION": "{!$Label.eCom_Common_ChangeConfiguration}",
    "ADD_TO_CART": "{!$Label.eCom_Add_to_Cart}"
  },
  "CONSTRAINT_POPOVER": {
```


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```
    "PRODUCTS_INCLUDED_EXCLUDED_HEADING": "{!
$Label.eCom_PRODUCTS_INCLUDED_EXCLUDED_HEADING}"
  },
  "CART": {
    "PAYMENT": {
      "PAYMENT_TITLE": "{!$Label.eCom_CART_PAYMENT_TITLE}"
    },
    "CART_SUMMARY": {
      "QUANTITY": "{!$Label.eCom_CART_SUMMARY_QUANTITY}"
    },
    "CHECKOUT": "{!$Label.eCom_CHECKOUT}",
    "BILLING_AND_SHIPPING_INFORMATION": "{!
$Label.eCom_BILLING_AND_SHIPPING_INFORMATION}"
  },
  "MANAGE_CART": {
    "CART_SUMMARY": {
      "CART_SUMMARY_TITLE": "{!$Label.eCom_Cart_Summary_Title}",
      "SUB_TOTAL": "{!$Label.eCom_Sub_Total}"
    },
    "CART_TABLE": {
      "ITEMS_IN_YOURCART": "{!$Label.eCom_ITEMS_IN_YOUR_CART}"
    }
  },
  "FOOTER": {
    "PRODUCTS": "{!$Label.eCom_FOOTER_PRODUCTS}"
  },
  "HEADER": {
    "SUBMIT": "{!$Label.eCom_HEADER_SUBMIT}",
    "ENTER_YOUR_SEARCH_TERM": "{!$Label.eCom_ENTER_YOUR_SEARCH_TERM}",
    "LAST_LOGIN": "{!$Label.eCom_HEADER_LAST_LOGIN}",
    "HOME": "{!$Label.eCom_HEADER_HOME}",
    "LOG_OUT": "{!$Label.eCom_HEADER_LOG_OUT}",
    "LOG_IN": "{!$Label.eCom_HEADER_LOG_IN}"
  },
  "PROMOTION": {
    "PROMO_CODE": "{!$Label.eCom_PROMOTION_PROMO_CODE}",
    "PROMOTION_APPLIED": "{!$Label.eCom_PROMOTION_APPLIED}",
    "APPLIED_PROMOTION": "{!$Label.eCom_APPLIED_PROMOTION}"
  },
  "LOGIN": {
    "USERNAME": "{!$Label.eCom_LOGIN_USERNAME}",
    "SIGN_IN": "{!$Label.eCom_LOGIN_SIGN_IN}",
    "INCORRECT_CREDENTIALS_TOASTR_MESSAGE": "{!
$Label.eCom_INCORRECT_CREDENTIALS_TOASTR_MESSAGE}"
```


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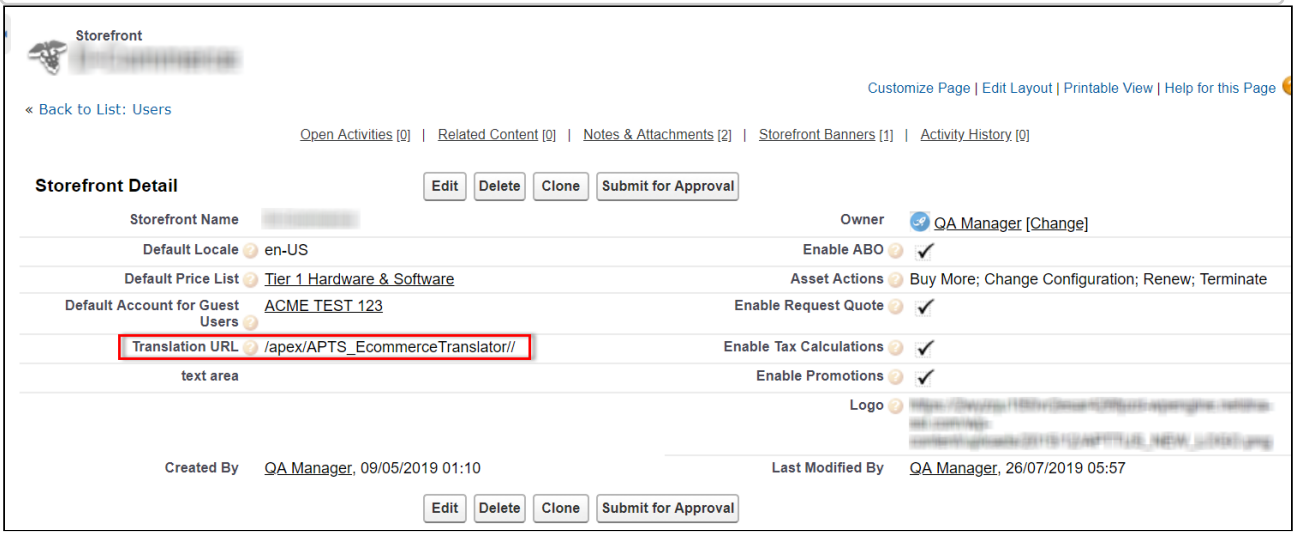
```
  },
  "PRODUCT_DETAILS": {
    "PRODUCT_DETAIL": "{!$Label.eCom_PRODUCT_DETAIL}",
    "PRODUCT_CODE": "{!$Label.eCom_PRODUCT_CODE}",
    "STANDARD_PRICE": "{!$Label.eCom_PRODUCT_DETAILS_STANDARD_PRICE}",
    "UPDATE_CONFIGURATION": "{!$Label.eCom_PRODUCT_DETAILS_UPDATE_CONFIGURATION}"
  },
  "INSTALLED_PRODUCTS": {
    "PRODUCT_FAMILY": "{!$Label.eCom_INSTALLED_PRODUCTS_PRODUCT_FAMILY}"
  },
  "MINI_CART": {
    "YOUR_CART_IS_EMPTY": "{!$Label.eCom_MINI_CART_YOUR_CART_IS_EMPTY}"
  }
}
</apex:page>
```




Wherever you are displaying a label on the UI, a translation pipe is used.

```
{{'MY_ACCOUNT.QUOTE_DETAIL.QUOTES_BY_STATUS' | translate}}
```

This translation pipe calls the translation loader service, which uses the translation get method to look for the translation URL whether it is in the code base or defined on the storefront object. The translation get method looks at the URL, reads the file, gets all the key values, and displays the response on the template.

## Defining translations on Salesforce using Custom Labels

For the translation URL defined on the Storefront record, you must define custom labels.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### To define custom labels

1. Go to Setup > App Setup > Create and click Custom Labels.
2. Click New Custom Label.
3. Enter a Short Description for the custom label you are creating.
4. Enter a Name for the custom label.
5. The default language is English.
6. In Categories, enter text to categorize the label.
7. In the Value text box, enter text. This value can be translated into any language that Salesforce supports.
8. Click Save.

Translations for custom labels determine what text to display for the label's value when a user's default language is the translation language.

1. Go to Setup > App Setup > Create and click Custom Labels.
2. Select the name of the custom label to open.
3. In the Translations related list, click New to enter a new translation or Edit next to the language to change a translation.
4. Select the Language you are translating into.
5. Enter the Translation Text. This text overrides the value specified in the label's Value field when a user's default language is the translation language.
6. Click Save.

## Defining translations for custom objects

Salesforce supports Product Translations, Category Translations, and Attribute Group Translations.

### To define translations for Products

1. Go to the Product Translations tab and click New. - OR - Go to the Product tab, select a product for which you want to define translation, and from the Product Translations related list, click New Product Translations.
2. Enter a Translation Name.
3. Enter translated text for the following fields:
    - Description
    - Language
    - Name
    - Product
    - ProductCode


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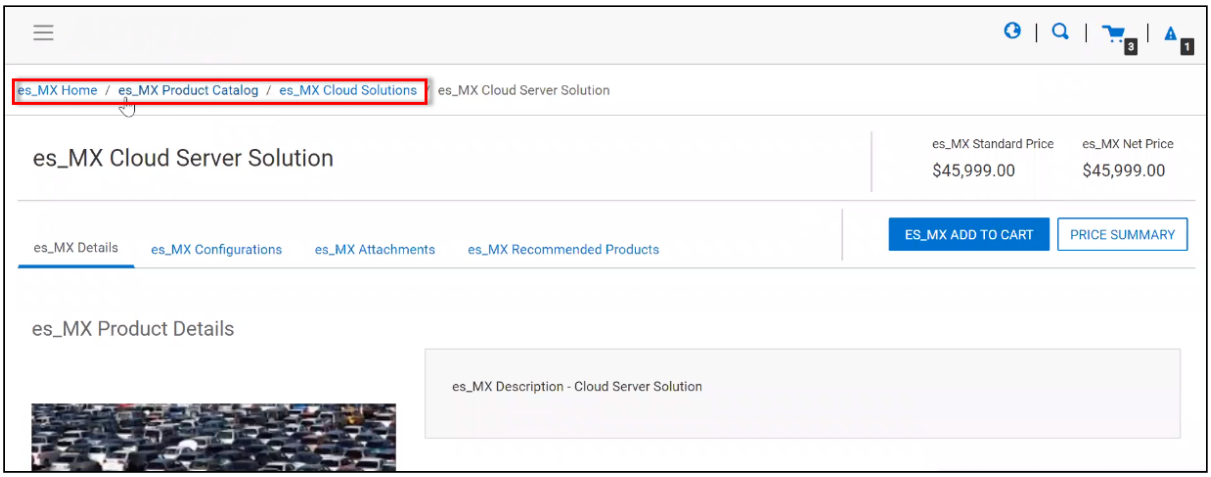
> ⚠ Currently, Family is not supported.

Now when you browse a product on the cart for which you have defined translations in Salesforce, the translated text is displayed.




> ⚠ For illustration purposes, the translated categories are prefixed with es_ in the above image. In the actual scenario, the correct language is displayed.

Similarly, you can define category translations.

## To define translations for Categories

1. Go to the Product tab, select a product for which you want to define the category translation.
2. Go to the Categories related list and click the category classification Id.
3. From the Product Classification page, click the Category.
   - OR -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4. Go to the Categories tab and select the Category for which you want to define translations.
5. From the Category Translations related list, click New Category Translation.
6. Enter a Category Translation Name.
7. Search and select the Category Hierarchy.
8. Enter a Language and a Label.
9. Select a currency.
10. Click Save.

### To define translations for Product Attribute Group

1. Go to the Product Attribute Groups tab and select a product attribute group for which you want to define the attribute group translation.
2. Go to the Attribute Group Translations related list and click New Attribute Group Translation.
3. Enter a Translation Name.
4. The Product Attribute Group field is already populated.
5. In Name, enter the translated attribute group name.
6. Enter a Language.
7. Select a currency.
8. Click Save.

## Setting Up Translations using Translation Workbench

You can also translate fields and objects using Translation Workbench. You can set up languages for your translations in the Translation Workbench.

## To set up translation using Translation Workbench

1. Go to **Setup** > **Administration Setup** > **Translation Workbench** and click **Translation Settings.**
2. Add a Language you want to support for your site.
3. To make the translations available to the users in that language, click **Active**.
4. Click **Save**.
5. Now go to **Setup** > **Administration Setup** > **Translation Workbench** and click **Translate**.
6. Select **Language**.
7. Select **Custom Field** as the *Setup Component*. This way you can translate the fields on an object.
8. Select an **Object**. A list of all the available fields in the selected object is displayed.


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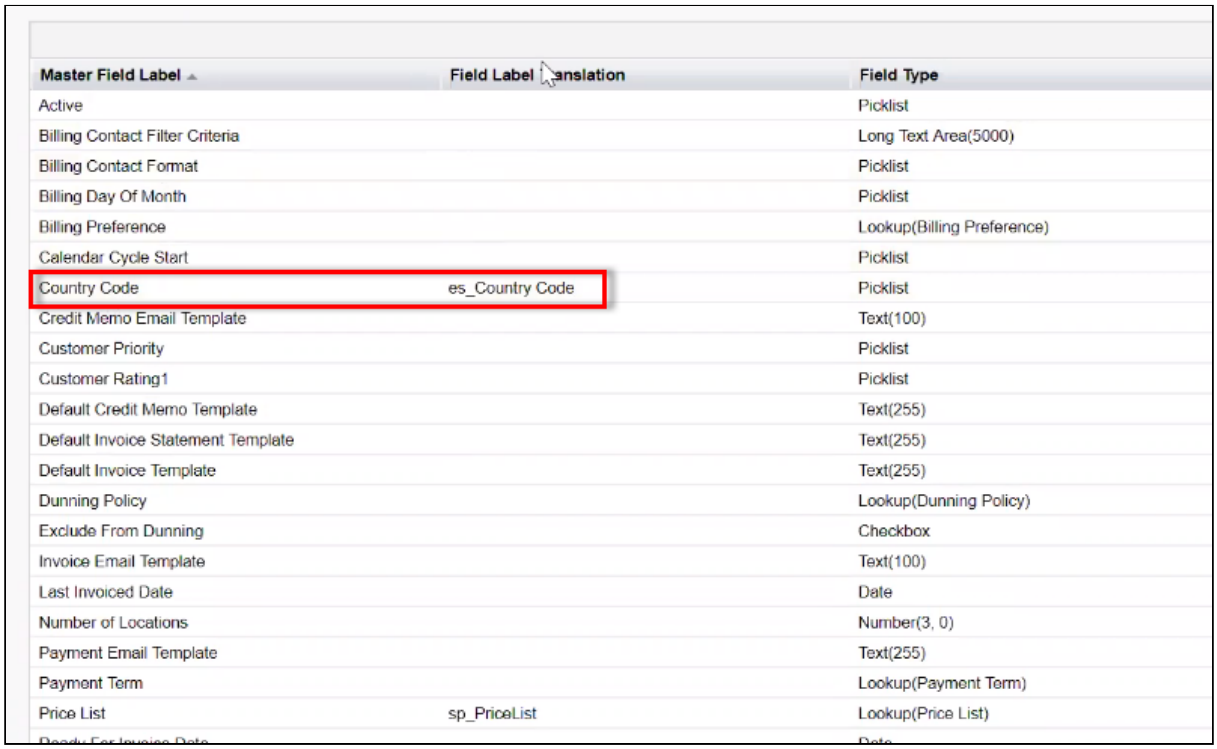
9. For the fields that you want to set the translations, double-click the **Field Label Translation**.



| Master Field Label | Field Label Translation | Field Type |
|---|---|---|
| Active | | Picklist |
| Billing Contact Filter Criteria | | Long Text Area(5000) |
| Billing Contact Format | | Picklist |
| Billing Day Of Month | | Picklist |
| Billing Preference | | Lookup(Billing Preference) |
| Calendar Cycle Start | | Picklist |
| Country Code | es_Country Code | Picklist |
| Credit Memo Email Template | | Text(100) |
| Customer Priority | | Picklist |
| Customer Rating1 | | Picklist |
| Default Credit Memo Template | | Text(255) |
| Default Invoice Statement Template | | Text(255) |
| Default Invoice Template | | Text(255) |
| Dunning Policy | | Lookup(Dunning Policy) |
| Exclude From Dunning | | Checkbox |
| Invoice Email Template | | Text(100) |
| Last Invoiced Date | | Date |
| Number of Locations | | Number(3, 0) |
| Payment Email Template | | Text(255) |
| Payment Term | | Lookup(Payment Term) |
| Price List | sp_PriceList | Lookup(Price List) |

10. Click **Save**.

## Adding a New Locale

You can add a new locale from the template. In the app.module.ts file of the template, refer to the following:

```
24  // Register locale data
25  import localeMx from '@angular/common/locales/es-MX';
26  import localeMxExtra from '@angular/common/locales/extra/es-MX';
27  import localeFr from '@angular/common/locales/fr';
28  import localeFrExtra from '@angular/common/locales/extra/fr';
29  import { registerLocaleData } from '@angular/common';
30
31  // If using additional locales, register the locale data here
32  registerLocaleData(localeMx, 'es-MX', localeMxExtra);
33  registerLocaleData(localeFr, 'fr-FR', localeFrExtra);
```

To add a new locale, for example, Italian (it). You must add the imports for the locale and then register the locale data with the following three lines.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```
35
36  import localeIt from '@angular/common/locales/it';
37  import localeItExtra from '@angular/common/locales/extra/it';
38  registerLocaleData(localeIt, 'it', localeItExtra);
39
```

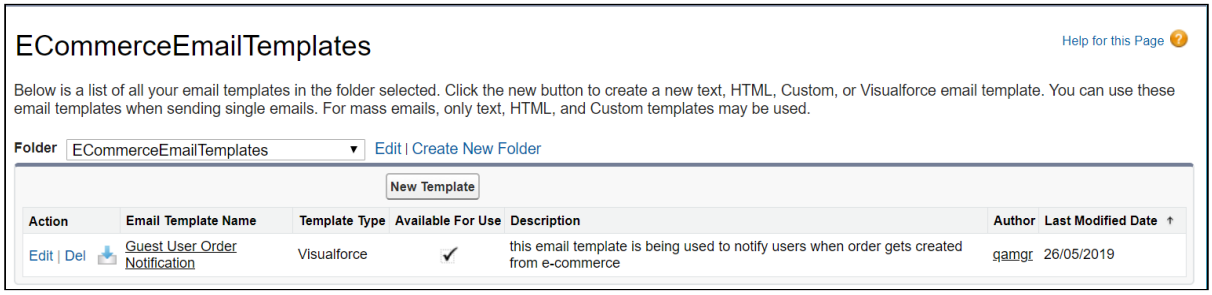
Another example, if you want to change the currency symbol on the UI from $ to some other currency, you must register it in the template as explained above.

# Setting Email Notification Template for Checkout

As a guest user or logged-in user, you receive a confirmation email after you place an order upon checkout.

## To set up email notification

1. Go to Setup > Administration Setup and click Classic Email Templates.
2. When you install the managed package, a folder named ECommerceEmailTempalates is available.




3. In Folder, select ECommerceEmailTempalates.
4. Click Edit for Guest User Order Notification. This is packaged with the managed package too. This email template is being used to notify users when an order gets created from the application.
5. Under the Email Template related list, you can view the default email template.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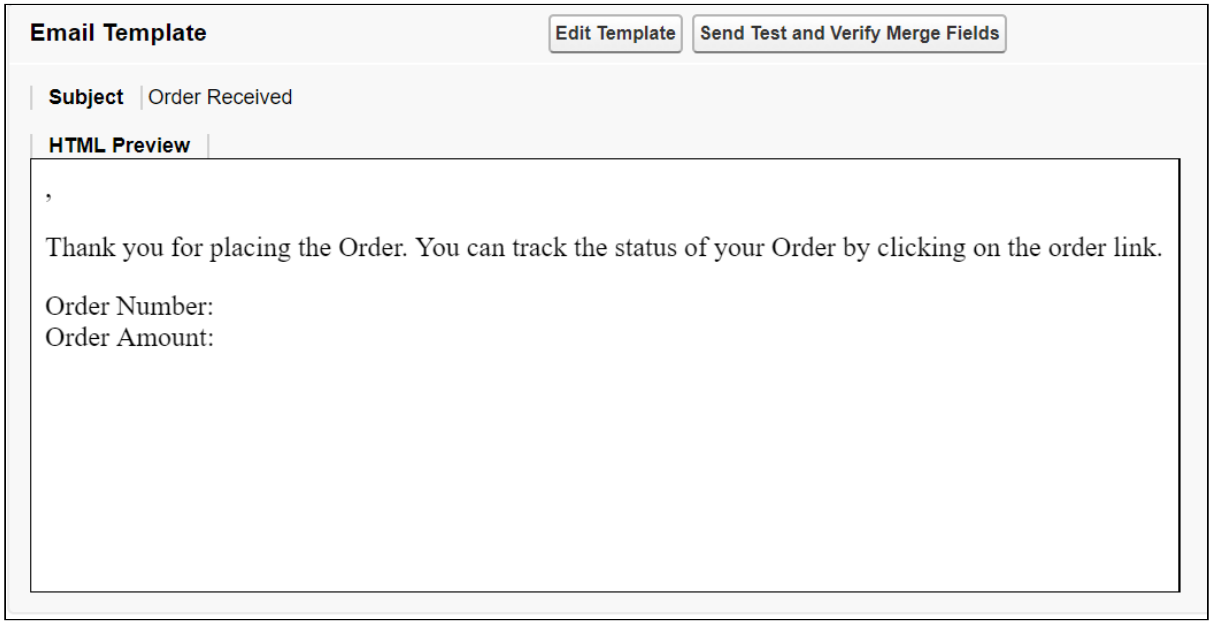
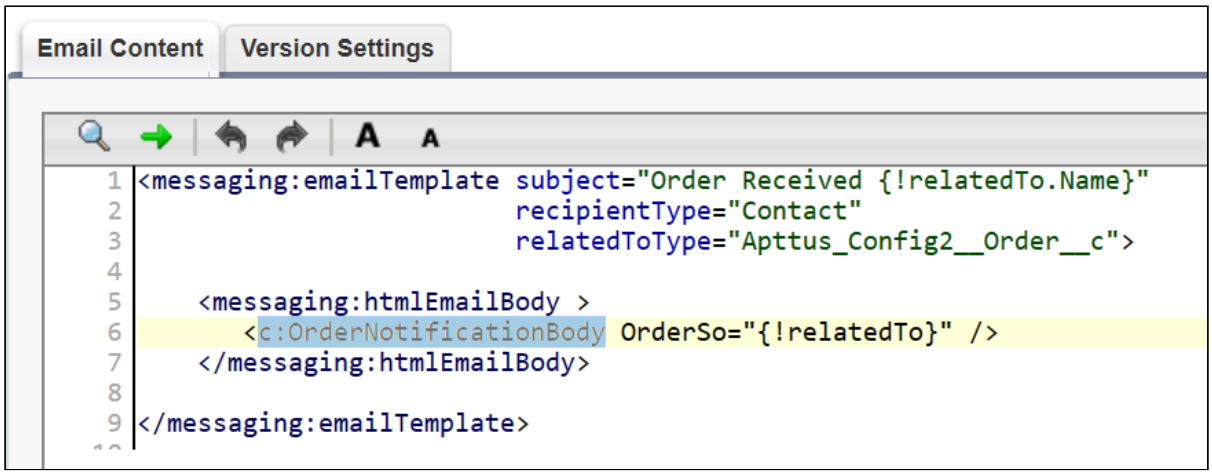



6. Click Save.

This template is the default template. You may choose to edit the template as per your requirement.

1. Click Edit Template.




2. This template has a default component that comprises the body of the email template. The component is highlighted in the image above.
3. To change the body of the template, you can define your own component and within this component, you can use OrderNotificationBodyController.getOrderURL(); to fetch the relative Order URL of your Digital Commerce application.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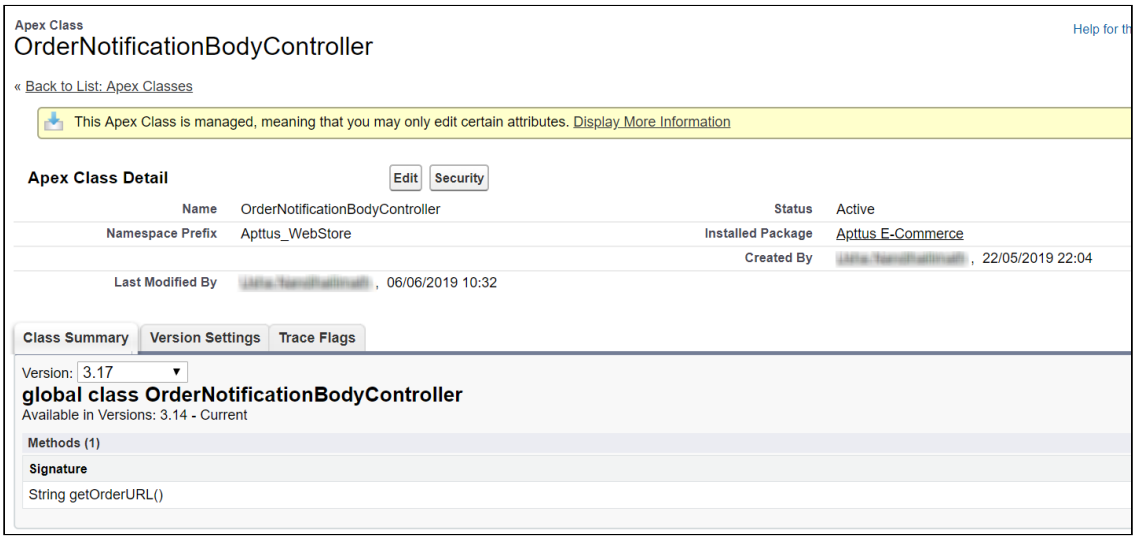
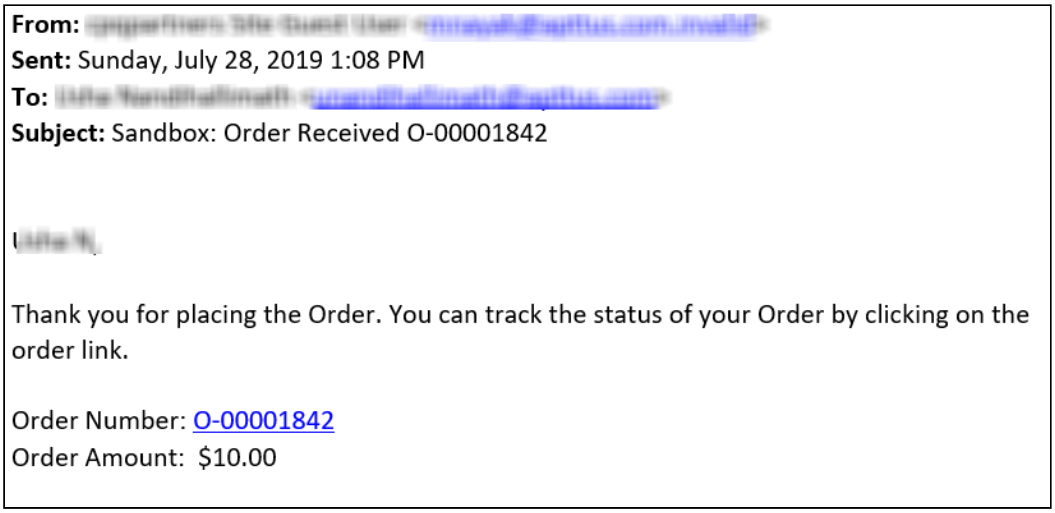
a. Click Setup > App Setup > Develop and click Apex Classes.
b. Browse and click to open OrderNotificationBodyController.




The class that is called is OrderNotificationBodyController.getOrderURL();

See the example email below:




# Creating Lookup Field on Account for the Price List

PriceListId gets added to CPQ on the Account object. Create a lookup field on the Account object for the Price List with API name PriceListId__c. You can use this Price List in the Storefront record, to set up your Storefront with Categories, Products, and more.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# Digital Commerce Application Caching

The API Cache object that comes with the managed package stores record information such as Line Item Ids and Attributes metadata for quick loading thus improving performance.

The API Cache object caches the Query String and does not rebuild it again once it is cached. When changes are made in the metadata that is part of the query string, you should always clean the Api Cache object.

> ⚠ You must provide CRUD permission to the API Cache object. Organization Wide Default (OWD) access for API Cache Object must be Public Read/Write.

Digital Commerce has a cache in place that stores dynamic queries so that the APIs do not have to rebuild them every time they are used. Every time an API is called, the default (50) cached records are pulled into the memory proactively to more intelligently speed up the API. There was no way to override the number of cached records.

A new admin setting named APTS_ApiCacheHydrateSize is introduced to override the default batch size.

## Clearing the API Cache

At times, changing the metadata (removing old fields, creating new fields, changing a User profile) may lower the performance of the application or display errors due the API Cache referring to the old fields as they are unavailable. To avoid this from happening, you may need to clear the API Cache from time to time for better performance. You can clear the cache in two ways:

- Use the Clear API Cache button on the Storefront record
- Schedule a batch job

### To clear API cache from the Storefront

1. Click **All tabs** and click **Storefronts**.
2. Select your Storefront from the available list.
3. Click the Clear API Cache button. The API Cache clearing process begins. An apex job is triggered to clear the cache records related to the selected storefront.


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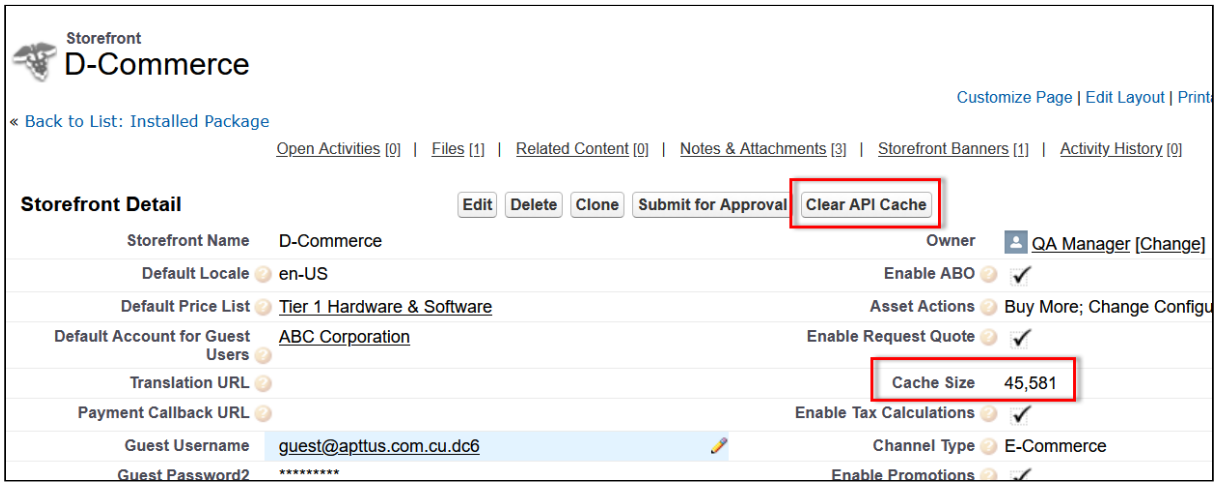


4. After the cache is cleared, the remaining cache data is displayed in the Cache Size field on the Storefront record.

## To schedule a batch job to delete cache records

1. Go to Setup and in the Quick Find box, type apex class.
2. Click Apex Classes.
3. Click the Schedule Apex button.
4. In Job Name, type a unique name. For example, Schecdule job to clear api cache.
5. In Apex Class, search and select *DCClearCacheDispatcher*.


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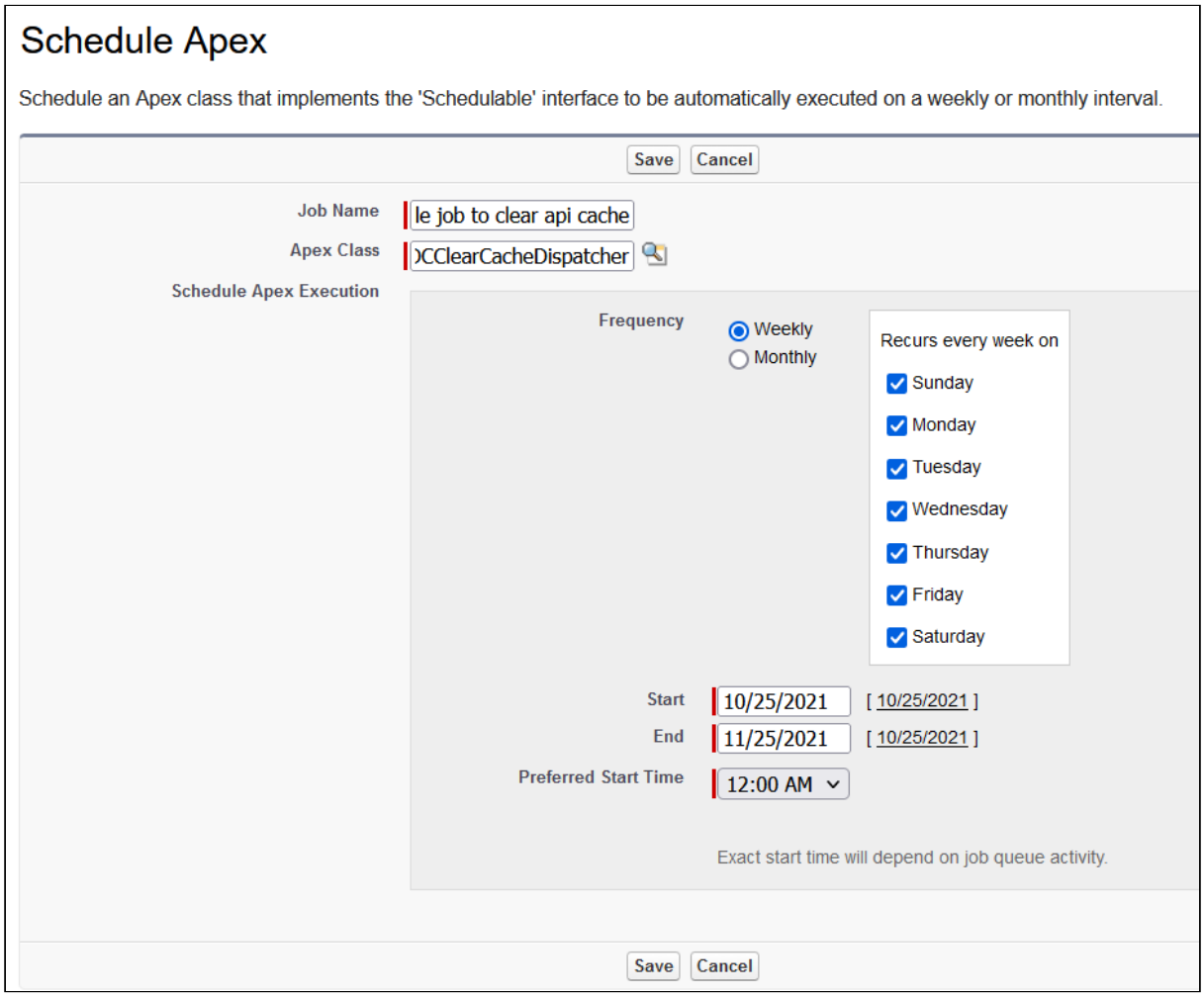


6. From the Schedule Apex Execution section, set the frequency as below:
    a. Select Weekly and select all the 7 days of the week.
    b. Specify a Start date.
    c. Specify an End date
    d. From the Preferred Start Time, set the time for 24 hrs. For example, 12:00 AM.
7. Click Save.

This scheduled job executes every 24 hours looking for any profile changes in the last 24 hours and deletes any APICache records associated to those profiles.

## Disabling the API Cache

Digital Commerce has a cache that stores dynamic queries so that APIs do not have to rebuild them each time they are used. However, there is an issue with DC API Cache


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overload when creating Bulk Orders. To address this issue, you need to create an admin key for the Storefront where you want to disable the API Cache.

## To disable the API Cache

1. Click the **App Launcher** ( ) icon > search and select **Admin**.
2. Click **New**.
3. Enter the following information:

| Field | Description |
|---|---|
| Name | Enter the exact name as **{{Storefrontname}}.DisableApiCache.**<br>**For example:** If your storefront name is Ecommerce, then the name must be **Ecommerce.DisableApiCache.**<br>⚠ Make an Admin record for each storefront where you want to disable the API Cache. |
| Value | Enter the value as **true**. |
| Code | Keep this field blank. |

4. Click **Save**.

# Configuring TurboEngines

**TurboEngines** is a concurrent processing engine provided by Conga that comprises various microservices that process pricing calculations (**TurboPricing**). TurboEngines offload the computation workload from the Salesforce platform to the **Conga Flexible Compute Platform** to reduce the processing time on the cart. Processing the computation workload in the Flexible Compute Platform reduces the interaction costs and the quote turnaround time specifically during peak load or large transactions.

Digital Commerce integration with Turbo engines fetches the master data on the product catalog and details page; thus highlighting performance improvements on the pricing side with Turbo pricing integration. It leverages Turbo APIs and Digital Commerce and how it can be used in your templates.

Turbo Integration is used mainly to achieve performance and high scalability. Classic config engines (client or server side) have limitations due to Salesforce platform with governor limits that prevents scaling beyond 100 SOQL queries per request or an API callout is not allowed after a DML operation. This prevents us from scaling and performing beyond


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a minimal complexity specially where a huge chunk of data is involved. Turbo integration are microservices that are highly performant and scalable and can serve the complex case of any configuration. These microservices are easily available through APIs leveraging these services to achieve better performance and that is what Digital Commerce is using.

By default, the Digital Commerce package is deployed in the non-TurboEngines mode. You can switch TurboEngines mode according to your business setup.

TurboEngines also provide a critical component called **TurboEngines Data Sync** services that provide a high-performance mechanism to sync pricing master data at regular, scheduled intervals (or on-demand) between Salesforce and the Flexible Compute Platform. Data is pushed to TurboPricing consumer endpoints and made available for processing to take advantage of the performance improvements offered by the TurboEngines platform.

The following section provides information and step-by-step tasks for integrating Digital Commerce with TurboPricing for your organization.


- Enabling TurboPricing in an Org
- Creating a Connected App
- Preparing Tenant Information
- Setting Up the TurboPricing Endpoint URLs
- Setting Up the Pricing Mode
- Configuring Remote Site Settings for Turbo Engines
- Configuring Data Sync for TurboPricing
- Pricing Mechanism


# Enabling TurboPricing in an Org

This topic provides a summary of the necessary steps for enabling TurboPricing for your org.

An administrator can be any of the following persona: Customer Administrator, Partner Administrator, any other administrators assigned the responsibility of enabling TurboEngines for their org. In the table on this topic, this persona is referred to as the *Tenant Admin*.

**Prerequisites**

- Refer to the Supported Features topic to make sure all features you want are included before making a provisioning request.


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- You must have the appropriate TurboEngines license before turning on your org. If you do not have a license, please contact your Conga Account Executive.
- The minimum required version of the **Conga Configuration & Pricing** package is **12.1814** to enable TurboPricing. Later versions are also supported.

# Enabling TurboPricing

To enable TurboPricing, perform the following steps for each org:

| Step | Task | Owner | Description |
|---|---|---|---|
| **Pre-Provisioning Tasks** | | | |
| 1 | Set up Connected App in your org | Tenant Admin | Create a connected app to provide authentication and authorization to TurboPricing Data Sync Service. |
| 2 | Prepare pre-provisioning tenant information | Tenant Admin | Gather all required information for provisioning your TurboPricing org.<br>Provide this information to Conga Technical Support to begin the provisioning process. |
| **Post-Provisioning Tasks**<br>Perform the following steps only after receiving a notice from Conga Technical Support that the requested orgs are provisioned. You must have the new service URLs to proceed. | | | |
| 3 | Configure Services | Tenant Admin | Update the following settings:<br>1. Set up the Pricing Execution Mode<br>2. Set up the TurboPricing endpoint URL |
| 4 | Configure data sync settings for TurboPricing | Tenant Admin | Complete the data sync for post-provisioning.<br>• For TurboPricing |


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| Step | Task | Owner | Description |
|---|---|---|---|
| 5 | Sync data to TurboEngines | TurboEngines Administrator (can be Tenant Admin) | Set up and schedule or activate data sync to sync pricing master data. |

# Creating a Connected App

As part of the pre-provisioning process, you must configure a Connected App in your org to provide authentication and authorization for the TurboPricing services.

## To create a Connected App

1. Navigate to **Setup > App Setup > Create > Apps**.
2. Scroll down and search for the **Connected Apps** related list and click **New** to create a new app.
3. Enter the following details in the **Basic Information** section.

| Field | Description |
|---|---|
| Connected App Name | Enter the name of the Connect App. |
| API Name | The API name is generated automatically based on the name of the Connected App. |
| Contact Email | Enter the email address of the administrator managing the Connected App. |

4. Enter the following details in the **API (Enable OAuth Settings)** section.

| Field | Description |
|---|---|
| Enable OAuth Settings | Select this to define the OAuth settings. For example, *TurboPricing*. When you enable this field, additional settings are displayed under **API (Enable OAuth Settings)** section. |


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| Field | Description |
| --- | --- |
| Enable for Device Flow | Select this to enable the connected app for an external application. |
| Callback URL | The **Callback URL** is generated automatically when you select the field **Enable for Device Flow**. For example, https://test.salesforce.com/services/oauth2/success is generated based on the instance URL. You can also add other URLs in separate lines. |
| Selected OAuth Scope | Select all entries under **Available OAuth Scopes** and move them to **Selected OAuth Scopes** by clicking the **Add** arrow. |
| Require Secret for Web Server Flow | Select this to require the connected app to provide a consumer secret for authorization. |

5. You must leave all other fields blank. Click **Save.**

## To capture Consumer Key and Consumer Secret

After you create a Connected App, the application generates **Consumer Key** and **Consumer Secret**. You must provide the values of **Consumer Key** and **Consumer Secret** to the Technical Support team.

1. Navigate to **Setup > App Setup > Create > Apps.**
2. Scroll down and search for the **Connected Apps** related list.
3. Click the name of the Connected App you created in the previous topic.
4. Click **Copy** next to **Consumer Key**.
5. Click **Click to reveal** next to **Consumer Secret**. After the value of the field is displayed, click **Copy**.
6. Store the information for the next part of the process.

# Preparing Tenant Information

Your provisioning request for TurboPricing must include specific information related to your tenant. Before your org can be provisioned, you must gather the required information and provide it to the Technical Support team.

> ⓘ Configure a Connected App to use with TurboPricing before collecting the information described in this topic.


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Refer to the following table for all required pre-provisioning information:

| Configuration | Required for Service | Description |
|---|---|---|
| OrgId | TurboPricing | This is the Salesforce Organization ID of the org to be provisioned for TurboEngine service. To locate your Organization ID:<br>1. Log in into the org to be provisioned.<br>2. Go to **Setup** > **Company Profile** > **Company Information** > **Salesforce.com Organization ID**.<br>3. Copy the 15-character ID (to be converted into 18 characters). |
| Org Type | TurboPricing | Org type to be provisioned (sandbox or production) |
| Tenant Name | TurboPricing | The one-word tenant name used for the tenant endpoint (for example, *customername-sandbox*) |
| Consumer Key | TurboPricing | The consumer key ( `client-id` in OAuth 2.0) generated from your Connected App. Refer to Creating a Connected App. |
| Consumer Secret | TurboPricing | The secret key ( `client-secret` in OAuth 2.0) generated from your Connected App. Refer to Creating a Connected App. |
| Salesforce User Name | TurboPricing | Admin username for the org to be provisioned with read/write access to CPQ (used by the Technical Support team for verifying settings). |
| Salesforce Password | TurboPricing | Password for the Salesforce admin user. |
| Authority | TurboPricing | The URL used to verify session ID for TurboPricing (*login.salesforce.com*, *test.salesforce.com*, or a custom Salesforce domain) |
| InstanceURL | TurboPricing | The URL given by the UI after logging into the org to be provisioned (for example, *customerturbo.my.salesforce.com*) |

After collecting all the required information, provide it with your tenant provisioning request to the Technical Support team.


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# Setting Up the TurboPricing Endpoint URLs

This section provides information on adding records to the Admin settings for setting up the TurboPricing endpoint URLs to trigger TurboPricing APIs.

## To add APTS_PricingServiceUrl

1. Go to **All Tabs** > click **Admin**. The Home page is displayed.
2. Click **New**. The New Admin page is displayed.
3. In the **Name** field, enter *APTS_PricingServiceUrl*. This must be the exact same name in your org. Do not change it. The storefront API looks for this profile name to fetch the TurboPricing endpoint URL.
4. In the **Value** field, enter the TurboPricing endpoint URL (with https://) provided by DevOps.
5. In the **Code** field, enter your 18 digit Org ID in lowercase.
6. Click **Save**.

## To add APTS_PricingServiceOverrideURI

1. Go to **All Tabs** > click **Admin**. The Home page is displayed.
2. Click **New**. The New Admin page is displayed.
3. In the **Name** field, enter *APTS_PricingServiceOverrideURI*. This must be the exact same name in your org. Do not change it.
4. In the **Value** field, enter the TurboPricing endpoint URL (without https://) provided by DevOps.
5. Click **Save**.

# Setting Up the Pricing Mode

This section provides information for setting up the pricing execution mode.

1. Go to **Setup** > **App Setup** > **Develop** > **Events** > **Custom Settings**.
2. Click **Config System Properties**. Click **Manage**.
3. Click **Edit** next to System Properties.
4. In the **Pricing Execution Mode**, enter *Turbo*.
5. Click **Save**.

For TurboPricing with SDK Integration, you must set the pricingMode = *turbo* in the base template.For details, refer to Configuring Templates.


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# Configuring Remote Site Settings for Turbo Engines

You must configure the remote site settings to add the service endpoint URL.

## To create a Remote Site record

1. Go to **Setup > Administration Setup > Security Controls > Remote Site Settings**.
2. Click **New Remote Site**.
3. Enter the name in **Remote Site Name**. For example, *TurboConfig*.
4. Enter the URL for the remote site in the **Remote Site URL**. Example service endpoint URL: https://dcexample.examplecloud.io, where dcexample is your tenant.

   > The Remote Site URL must be the service endpoint that DevOps provisioned while onboarding your tenant.

5. Enable **Active**, if not selected by default.
6. Click **Save**.

# Configuring Data Sync for TurboPricing

To complete post-provisioning for TurboPricing, the tenant admin must configure settings for data sync services. TurboEngines data sync provides a high-performance mechanism to sync pricing master data at regular, scheduled intervals (or on-demand) between Digital Commerce and TurboPricing. Before the initial data sync, you must configure settings to enable data sync services and give the administrator access to the TurboEngines Data Sync Admin user interface (UI) to set up and schedule or activate the sync.

Perform the following tasks to complete post-provisioning data sync tasks for TurboPricing:

## Configure Data Sync Specific Settings

You must configure the data sync service URL and a CSD Trusted Site entry so SFDC can communicate with an external server.


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### To configure the service URL

1. Go to **Setup** > **App Setup** > **Develop** > **Custom Settings**.
2. Click **Manage** next to **Turbo Engine Admin Properties**.
3. Click **New**.
4. Enter the following required properties:
    - **Name**: LightsaberServiceUrl
    - **Turbo Engine service Endpoint**: Endpoint URL provided by the Technical Support Team
5. Click **Save**.

### To configure the CSD Trusted Site

1. Go to **Setup** > **Administration Setup** > **Security Controls** > **CSD Trusted Sites**.
2. Click **New Trusted Site**.
3. Enter the following required properties:
    - **Trusted Site Name**: Enter a name for the trusted site (for example, "TurboEngineAdminService")
    - **Trusted Site URL**: Enter the full URL. This is the service URL you configured in the previous section (To configure the service URL).
    - **Context**: Select a context.
4. Click **Save**.

## Configure Permissions for Data Sync Admin User

Users who need to configure and run Turbo Engine Data Sync must have permission to access and use the Data Sync Admin UI. This can be a user who is assigned to the System Administrator profile, or you can customize a profile and create one or more users in this role.

### To check if the current user has the right permissions

1. Log in to your organization as the admin user.
2. Open the Salesforce App Launcher (Lightning) and launch the **Turbo Engine Admin** app.
3. If the **Data Integration** and **Callbacks** tabs are visible after launching the app, the user has the correct permissions. Otherwise, log in back as a system administrator and perform the following tasks to provide access to the user profile.


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### To provide access to the data sync app

1. Go to **Setup > App Manager**.
2. Find the **Turbo Engine Admin** app on the list. Click the drop-down and the end of the row and select **Edit**.
3. Click **User Profiles**.
4. From the list of Available Profiles, search and select the app you want to add.
5. Click the right-facing arrow to move the profile from the list of Available Profiles to the list of Selected Profiles.
6. Click **Save**.

### To make all tabs visible in the data sync app

1. Go to **Setup > Profiles**.
2. Search for the profile you want to configure and click **Edit**.
3. Under Custom Settings, make sure the following tabs are set as "Default On":
    - **Data Integration**: This tab serves as the starting point for managing all consumer profiles.
    - **Callbacks**: This tab allows you to manage pricing callbacks for Turbo Pricing.
    - **Consumer Profile**: This tab allows you to set up and configure data sync operations.
    - **Run Details**: This tab allows you to review run history for data sync and take action.

## Setting Up and Syncing TurboPricing Data

For complete information and the tasks required to administer TurboEngines data sync for TurboPricing, refer to the latest *TurboEngines Data Sync Administrator Guide* on the Documentation portal.

# Pricing Mechanism

You can change the pricing of products using the following flags at the template level:

- skipPricing
- skipRules
- pricingFallback


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The Digital Commerce SDK consists of the following flag to change pricing. These flags are available in the environment file.

| Flag | Description |
|---|---|
| *skipPricing* | By default, this flag is set to True. When the user changes an existing cart, Digital Commerce skips pricing meaning pricing still runs in the background making another network call, thus scalable to large carts. Setting this flag to False allows Digital Commerce to perform pricing when the user changes an existing cart, meaning all CRUD operations such as update quantity, delete a line item, data change along with pricing on the cart are performed in a single network call. This is ideal for a cart with up to 50 line items. For more than 50 line items, it is recommended you set the skipPricing flag to True. |
| *skipRules* | By default, this flag is set to False. When the user changes an existing cart, Digital Commerce evaluates the rules. Setting this flag to True skips rules when the user changes an existing cart. |

You may use these flags with the following combinations to allow Digital Commerce to make changes to the cart with or without pricing parameters.

- skipPricing = True and skipRules = False
- skipPricing = False and skipRules = True
- skipPricing = False and skipRules = False

You can set up a pricing fallback when TurboPricing fails. The following flag is available in the environment file.

| Flag | Description |
|---|---|
| *pricingFallback* | By default, this flag is set to False. When TurboPricing fails, an error message is displayed without any further action. Setting this flag to True enables the system to use CPQ pricing. |

You can also set up a pricing retry mechanism if you want further action when the TurboPricing or CPQ Pricing fails. When pricing fails a pop-up appears with the **Retry** and **Clear Cart** buttons.


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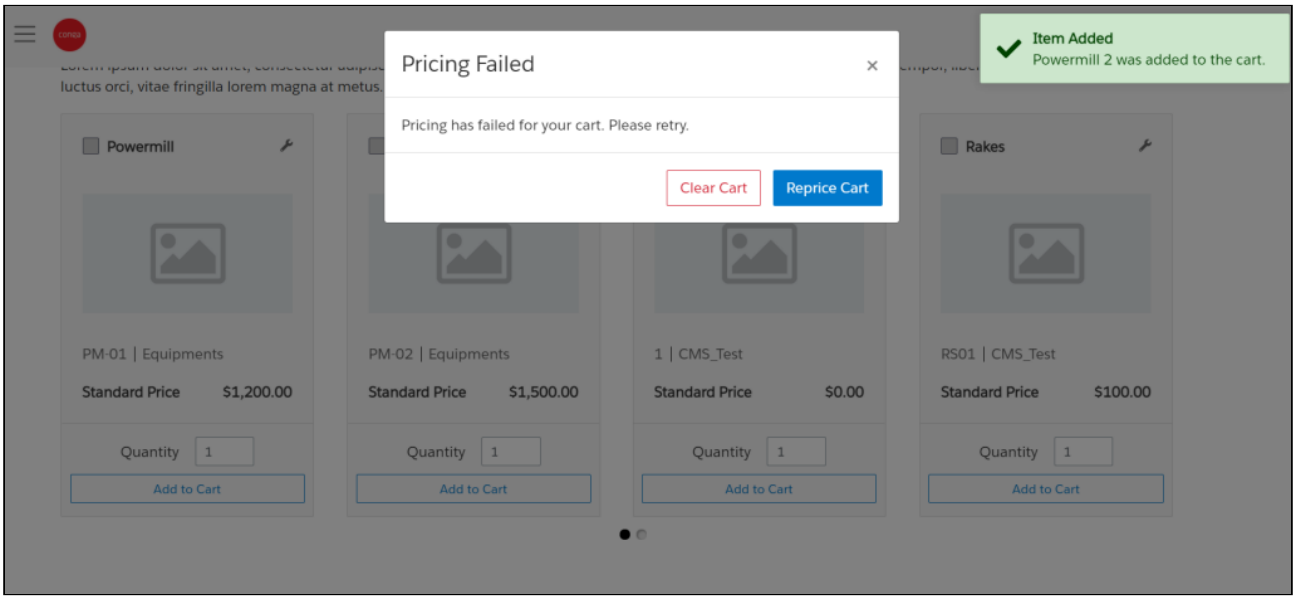


When the user clicks Retry, Digital Commerce performs pricing again; when the user clicks Clear Cart, Digital Commerce clears the cart if you do not want it to perform repricing. If the user moves away from the pop-up without performing any action, these buttons are still available in the top bar of the Catalog, Product details, and View Cart pages.


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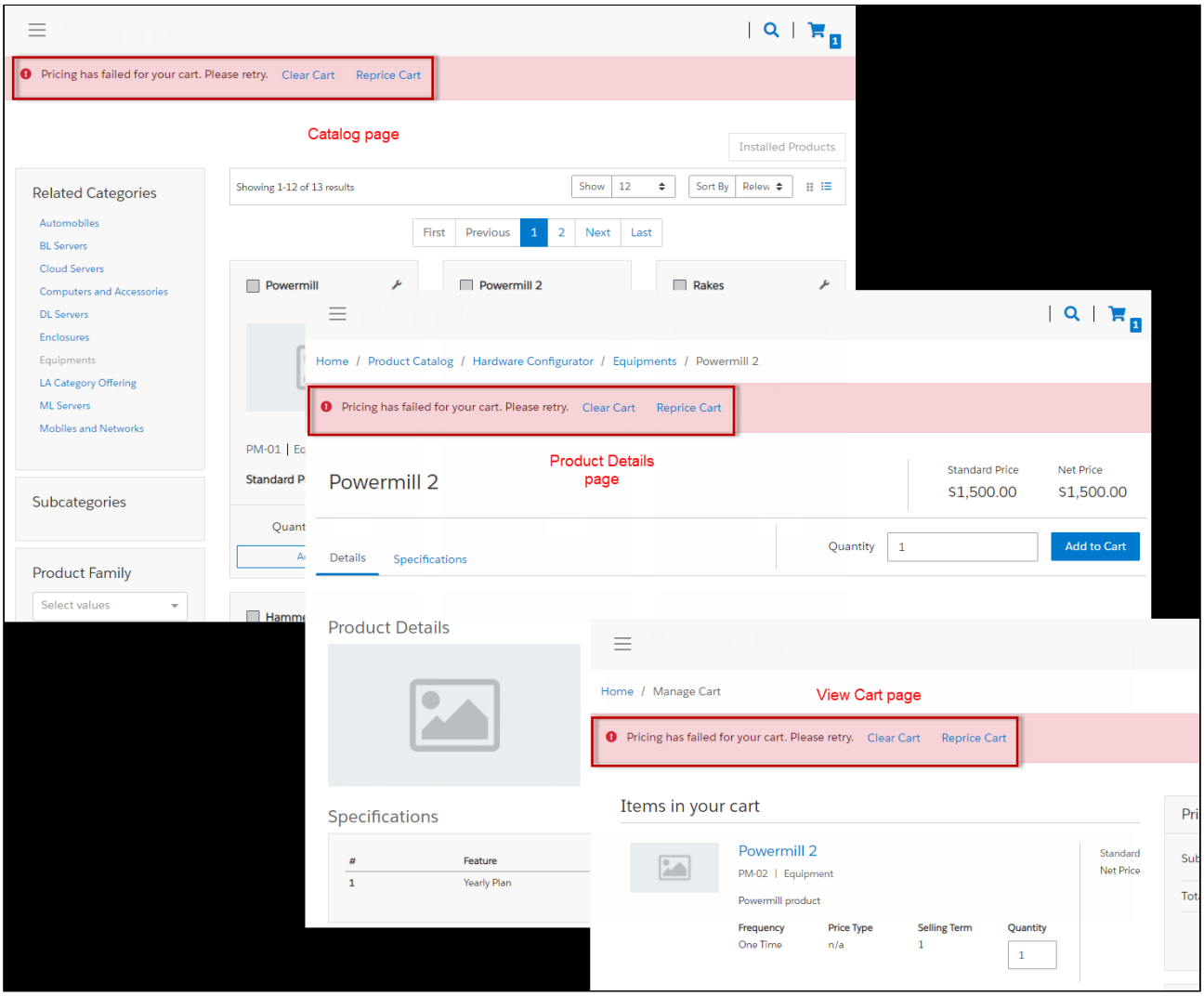


# Downloading the Digital Commerce SDK

Previously, the Conga Cloud Ops team provided access to the npm packages and libraries along with other artifacts to download and deploy the Digital Commerce application.

With the December '21 release, the following changes are done for easy access to the artifacts through a public facing Github repository.

- The core, ecommerce, and elements libraries that form the SDK are hosted at: https://github.com/orgs/congacommerce/packages github repository.
- To install the SDK packages, you must make the following changes to the *package.json* file before running the *npm install* command:
    - Rename @apttus/core to **@congacommerce/core**
    - Rename @apttus/ecommerce to **@congacommerce/ecommerce**
    - Rename @apttus/elements to **@congacommerce/elements**


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- All the SDK libraries along with ecommerce and partner-commerce base templates are moved to a mono repository structure (single repository). From the new repository, under Projects, the folder named *congacommerce* contains the SDK libraries.
  The ecommerce and partner-commerce folders contain the configuration and json files that point to the new *congacommerce* library.
- After the SDK libraries are built, they are published to the github release registries here:
  - For ecommerce template: https://github.com/congacommerce/e-commerce/tree/release/december-21
  - For partner template: https://github.com/congacommerce/partner-commerce/tree/release/december-21
  - For Packages https://github.com/orgs/congacommerce/packages
    This is a public repository with read access. This repository contains the following three packages also called artifacts:
    - core
    - ecommerce
    - elements

    To view the latest version, click the core package.

All these changes ensures that all the consumable code base is under a single repository.

> **IMPORTANT**
>
> After cloning the reference template, you must update the ***npmrc file*** in the reference template with the SDK library hosted URL as below. Enter your Github authentication token at line 2 after authToken=

```
@congacommerce:registry=https://npm.pkg.github.com/
//npm.pkg.github.com/:_authToken=
```

- Cloning the Reference Templates
- Installing the Reference Template
- Configuring Templates
- Running the Application in Localhost
- Deploying the Application to Salesforce


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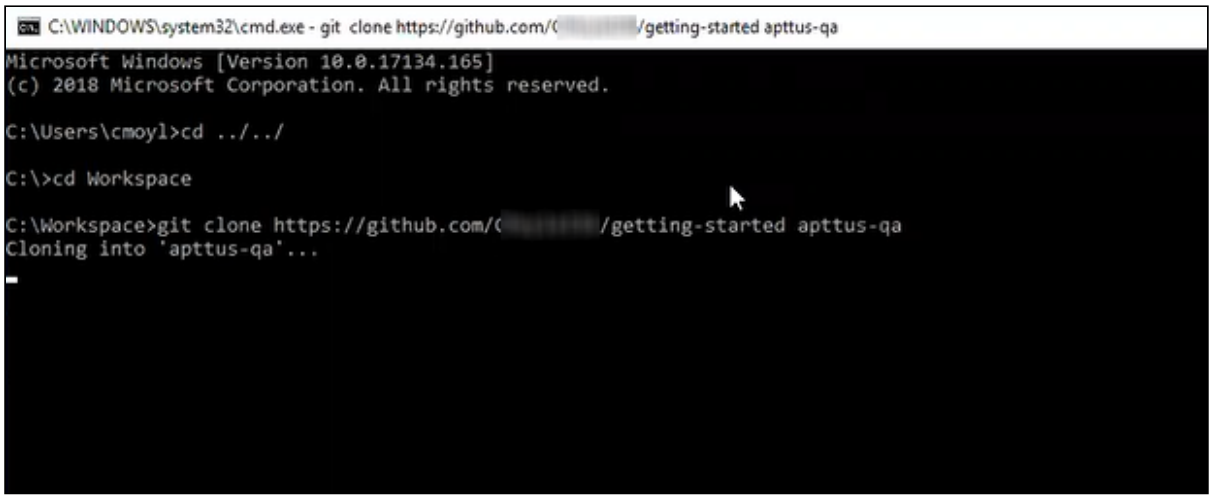
# Cloning the Reference Templates

You can clone a template from the standard repository and customize it as per your specific requirement.

## To clone a template from the repository

1. Open command prompt and type *git clone,* the *URL* of the template, and a new name for your cloned template. See the following example:




2. Press **Enter** on your keyboard.

Your template is cloned. You can now open the code for the cloned template.

# Installing the Reference Template

After cloning a template, the first task is to run the npm install command. For this, you must have access to the npm registry for the SDK. To gain access to the artifacts you must raise a ticket with the DevOps team.

After you can have access to the SDK, you must run the npm install command. The npm install command installs third party libraries. One of the dependencies under the package.json folder is the apttus/ecommerce library that bundles all the components library and the data access layers. The npm install process sets up the Digital Commerce SDK with your Salesforce instance.

**Pre-requisite**: You must ensure that the following tasks are completed before you run the npm install command:

- Install required packages on your Salesforce org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- Set up a community, if not already done
- Create a custom field on Accounts for Price List
- Create a Store object and a store record within it
- Ensure you have node.js and angular-CLI installed on your local machine in order to use the templates

## To install the SDK and dependent libraries

1. Open the code of the template.
2. Type **npm install** and press **Enter** on your keyboard.

The SDK and dependent libraries are ready for use.

> In case you face issues installing the SDK, you may need to authenticate using your Github token.

# Configuring Templates

You can open the repository folder on your local machine to check the setup.

> A new folder named node_modules is created. You should never modify anything in the node_modules folder. This folder is not part of the repository. All the third party dependencies get installed in this folder. Whenever you run an npm command the dependencies are overridden in this folder.

## Salesforce Credentials

As part of the setup, sf.json file is created that contains the credentials for deploying the application. If you want to deploy your Storefront in a different org, you can update the credentials in this sf.json file.

## Configuration Parameters

During the npm install phase, a configuration file named config.ts is automatically created. This is a runtime configuration for the application. This file is different from the sf.json file. The config.ts file contains runtime specific variables that help the application to operate. You must set it up with the following parameters:


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| Name | Type | Required | Default Value | Description |
|---|---|---|---|---|
| production | Boolean | Yes | - | Specify the environment where you want the application to run. |
| organizationId | String | Yes | - | Specify the org Id of the application. For details, see the *Contact Support* section. |
| defaultImageSrc | String | No | - | Specify the URL of the default image to use when no image is found. |
| defaultCountry | String | Yes | US | The default country code is "US". |
| defaultLanguage | String | Yes | en-US | The default locale is "en-US". |
| enableErrorLogging | Boolean | Yes | True | Set this to True, in non-production mode, to send error logs. |
| enableErrorReporting | Boolean | Yes | True | When set to True, in non-production mode, it shows a model window to provide user feedback. |
| enableMultiCurrency | Boolean | No | False | If using a multi-currency enabled org, set to true to enable currency fields on models. |
| enableErrorPrinting | Boolean | Yes | True | |
| enableQueryLogs | Boolean | No | True | Set to true to print query requests and results in the browser console. |


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| Name | Type | Required | Default Value | Description |
|---|---|---|---|---|
| enablePerformanceLogs | Boolean | No | True | Set to true to print performance metrics of requests in the browser console. |
| defaultCurrency | String | Yes | USD | The default currency to use for guest users. Defaults to "USD". |
| bufferTime | Number (milliseconds) | No | 200 | The number in milliseconds to wait before sending requests. A larger number will batch requests into a single network callout, but may decrease performance. |
| maxBufferSize | Number | No | 10 | The maximum number of requests to batch into a single callout. |
| disableBuffer | Boolean | No | False | When set to true, will disable buffered requests entirely. 1 request = 1 network callout. |
| subqueryLimit | Number | No | 20 | |
| pricingMode | 'default' \| 'turbo' | No | default | The default pricing mode is "default". To use TurboPricing as the pricing mode, set the value to "turbo". |
| disableCache | Boolean | No | False | When set to true, data returned from requests will not be cached. |


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| Name | Type | Required | Default Value | Description |
|---|---|---|---|---|
| encryptResponse | Boolean | No | True | When set to true, responses from the server will be encrypted.<br>⚠ Encryption payload is limited to 1 MB. |
| productIdentifier (Deprecated) | String | No | Id | The API name of the field on the product to use as the unique identifier in the application. |
| cartRetryLimit | Number | No | 10 | Maximum number of times the CPQ reprice operation should be attempted when the state of the cart changes. |
| debounceTime | Number (milliseconds) | No | 200 | Amount of time the application should wait for user input before batching DML operations. |
| storageAccount (Deprecated) | String | No | - | |
| tenantId (Deprecated) | Number | No | - | |
| tenant (Deprecated) | String | No | - | |
| proxy | String | No | - | The login proxy to use to bypass CORS restrictions on login. |
| useIndexedDB | Boolean | No | False | When set to true, data cache will be persisted in browser IndexedDB. |


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| Name | Type | Required | Default Value | Description |
|---|---|---|---|---|
| skipPricing | Boolean | Yes | True | When the user changes an existing cart, Digital Commerce skips pricing. Setting this flag to False allows Digital Commerce to perform pricing when the user changes an existing cart. |
| skipRules | Boolean | Yes | False | When the user changes an existing cart, Digital Commerce evaluates the rules. Setting this flag to True skips rules when the user changes an existing cart. |
| pricingFallback | Boolean | Yes | False | When TurboPricing fails, an error message is displayed without any further action. Setting this flag to True enables the system to use CPQ pricing. |
| packageNamespace | String | Yes | - | |
| storefront | String | Yes | Null | |
| expandDepth | Number | No | 10 | The maximum number of queries that should be executed to populate subquery data. |
| hashRouting | Boolean | No | False | |
| queryDepth | Number | No | 2 | The maximum depth of relationships to be used in a query. |


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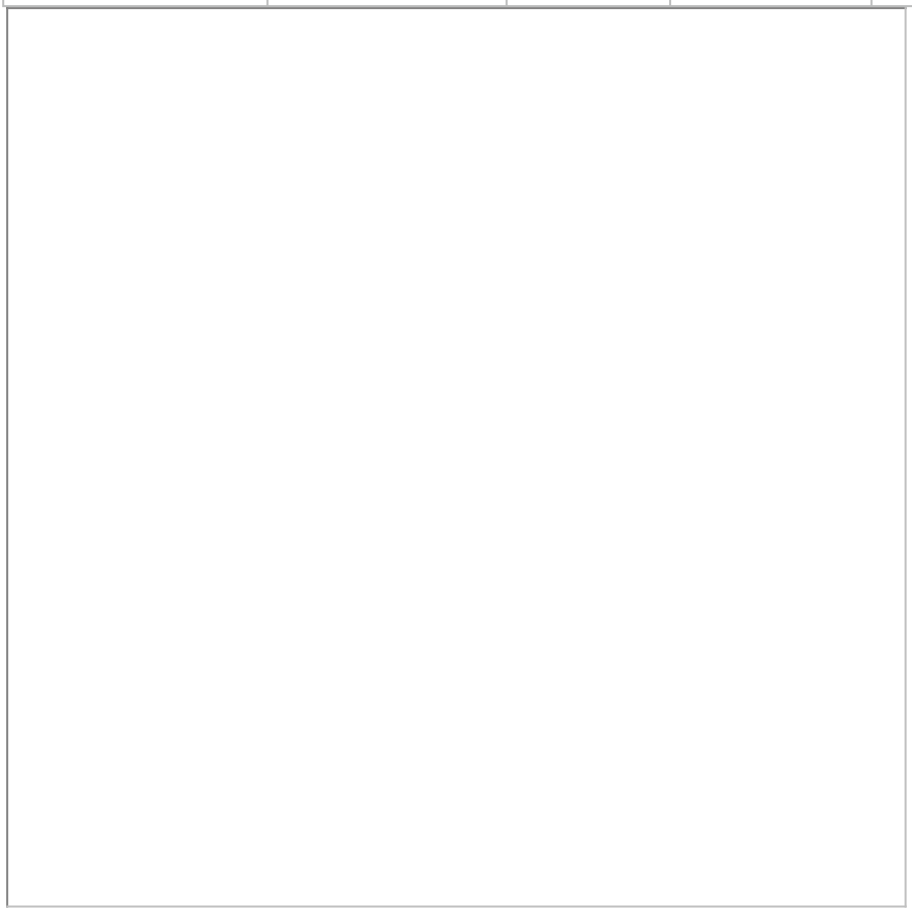
| Name | Type | Required | Default Value | Description |
|---|---|---|---|---|
| endpoint | String | Yes | - | Specify the URL you set on the community sites. |
| sentryDsn | String | No | - | |
| runTimeDebugMode | Boolean | Yes | False | |
| connectedApp | ConnectApp | Yes | - | |
| defaults | Defaults | | | |



## Setting Up Proxy for Local Development

There is also a proxy.config.json file that gets installed in the root directory as part of the deployment. To configure the proxy.config.json file, you must provide the Community URL in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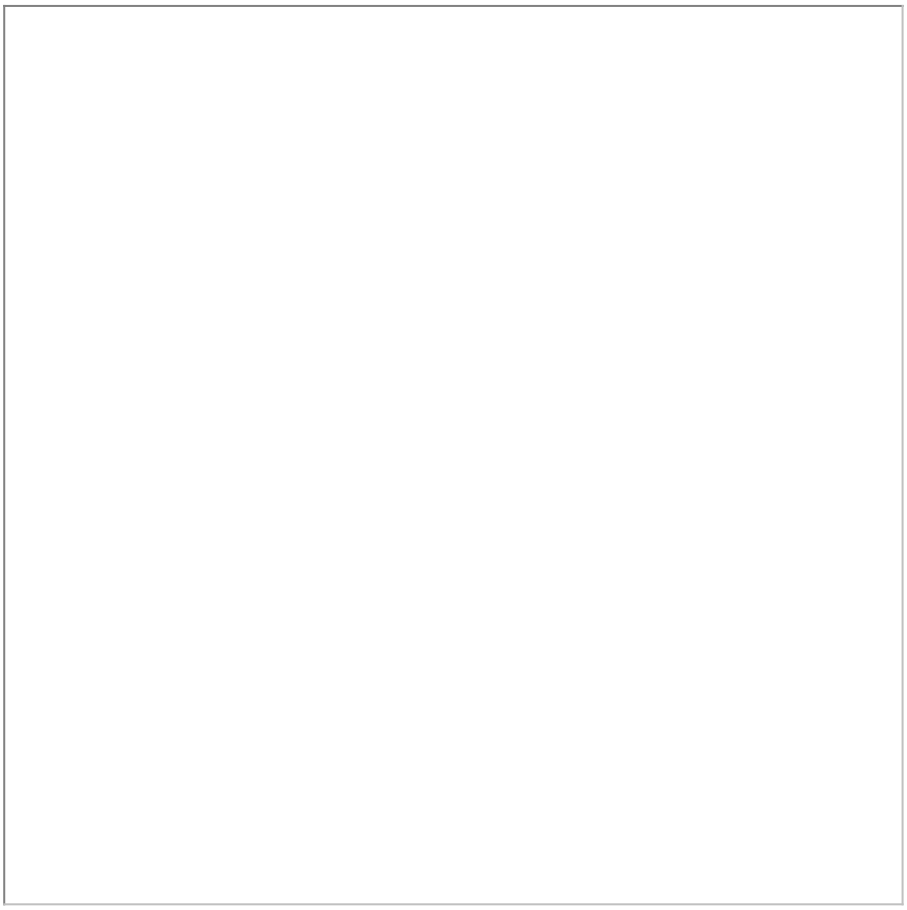
both the target locations. This allows you to make SOAP API calls from your local development server (for functionality like login and reprice cart). Populate the 'target' attributes in that file with the instance URL of your community.



All the code for the templates is open sourced into the library we just cloned and installed. It consists of all the modules such as cart page, home page, account page, and more. We can go into any template, for example, Home page layout where you can see some of the components of the underlying component library. For example, apt-jumbotron. This is a component library that gets installed as part of the apttus/ecommerce. You don't need to essentially build a code for this component. This is a component with the npm package. You just need to modify a single line of HTML code to reference and use it.

You can reference your configuration and import them into your main application module from the app.module.ts file. This app.module.ts file contains an ApttusModule and a CommerceModule. These two modules are getting referenced from the underlying libraries. You must import them into the root module or application to use them.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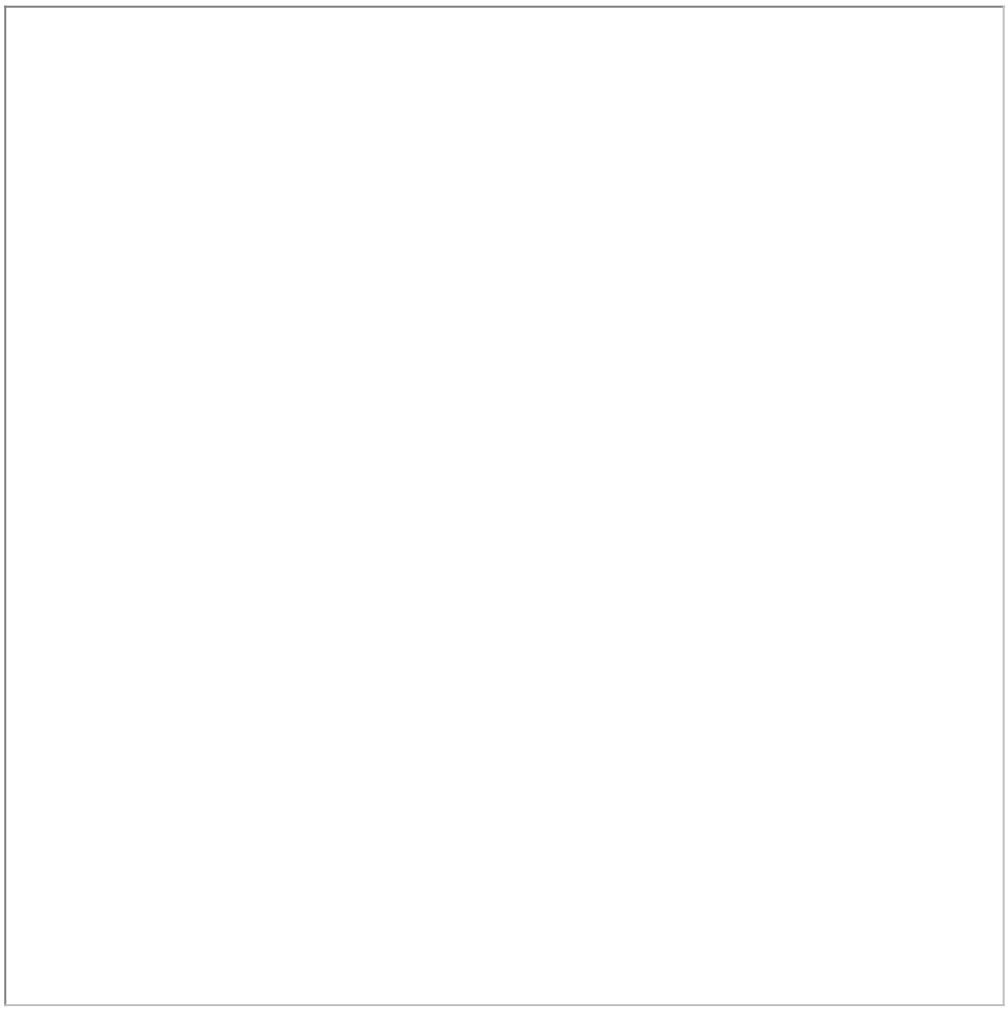
# Importing the app modules in the root module

Add two lines for the following:

- ApttusModule.forRoot - The module runs all the underlying state management, caching, communication with the Salesforce org. You must import the configuration from the config.ts file.



- CommerceModule.forRoot - In the forRoot method of the CommerceModule declare the storefront that you want to use. For example, CommerceModule.forRoot('Tier 1')

This defines the Storefront for your application.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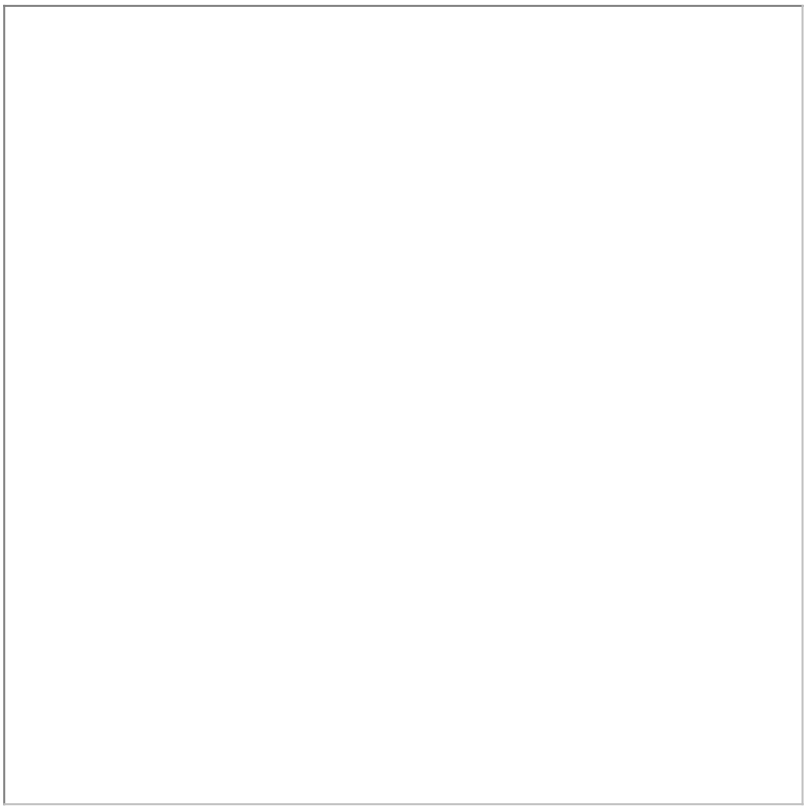

## Setting Up Subset of Categories

You can set up specific categories or subset of categories from the header.component.ts file.

## Turning Off Sentry for a Customer

Our angular application is wired into Sentry, any errors that occur for customers are sent to sentry. You can view those in sentry, along with stack trace, and debug them. If customers don't want such information to be sent to us, you may consider turning it off for customers.

Go to config.ts and do the following:

- enableErrorLogging - Set this to False.
- enableErrorReporting - Set this to False.


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# Running the Application in Localhost

Now that the SDK and dependent libraries are installed and ready for use, you must use the ***npm run build*** command. This command builds the angular application in your local machine.

To run your application locally on your local machine use the ***ng serve*** command. This command runs the E-Commerce site locally in your local machine against the configuration that you set up during the npm install phase.

Navigate to http://localhost:4200/ to see how your application looks like. The application displays categories, products, pricing, and more based on the Price List selected in the Storefront record. The app is automatically reloaded if you change any of the source files.

## Bootstrap Theme Changes

Bootstrap and ngx Bootstrap (angular wrapper to Bootstrap) is installed during the npm install phase. The templates are built around the Bootstrap as a UI framework. You can change to any other mechanism if you don't want to use Bootstrap.

A variables.scss file is installed in the template. If you want to do some quick and easy theme change to your template, you can modify this file as per your requirement. All this follows standard Bootstrap framework constructs to modify cards, dropdowns, forms, buttons, and more.

# Deploying the Application to Salesforce

After everything looks correct in your local machine, you are now ready to deploy your Digital Commerce application on your Salesforce Org.

## Deploying Standard Template

Along with the managed package, you get a standard template.

### To deploy the standard template

1. Create a Storefront Record pertaining to your desired template. To deploy the eCommerce template, you must name your storefront **D-Commerce**. All other settings


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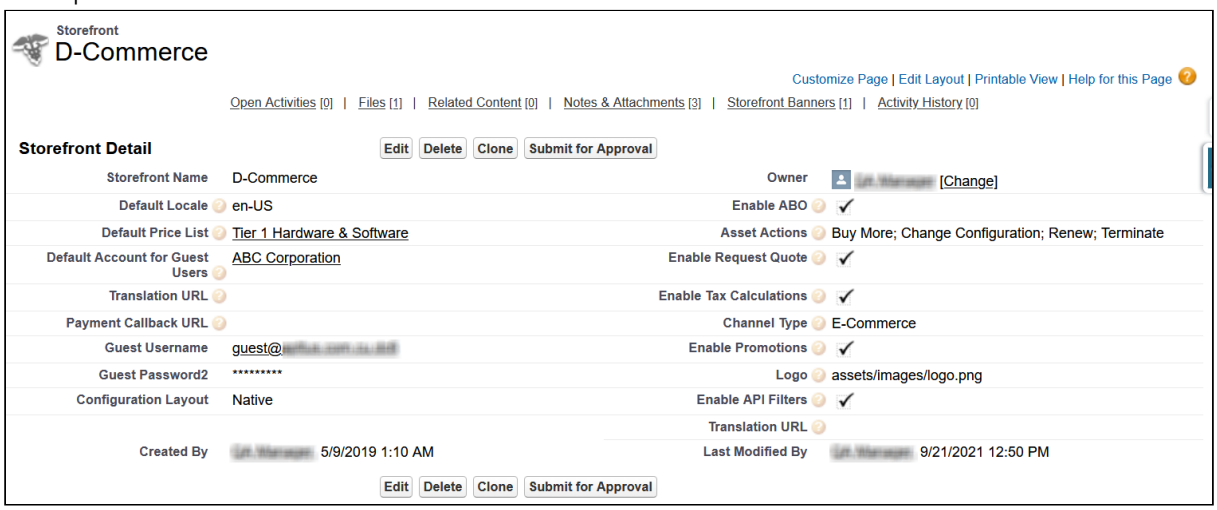
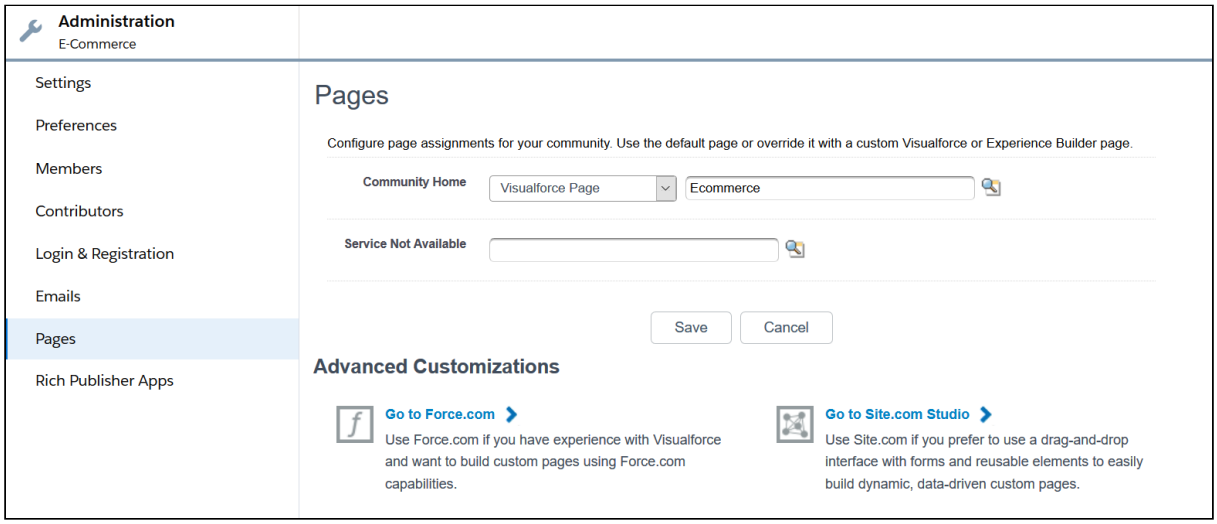
are optional.




2. Set up a Community to host the storefront you created. After the community is set up, assign the corresponding visualforce page as the home page of the community.
3. Within the community workspace, go to the Administration section, and from the left menu, click **Pages**.




4. From the Community Home drop-down, select **Visualforce Page**. Search and select **ECommerce** for your template and click **Save**.

Your standard template is successfully deployed. From All Communities, click the URL to see how your application looks in your Salesforce org.

# Deploying Custom Template

If you have access to the Digital Commerce SDK and have customizations of your own. You can deploy your customizations to Salesforce and host them in your community.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## To deploy custom template

1. You must set up the **Main.ts** file. The Digital Commerce SDK breaks out the individual pages into *chunks* that make load times quicker for those pages. In order to support this within Salesforce, you must point the webpack script to the chunks. You can do this by modifying the main.ts file as below:

```
import { enableProdMode } from '@angular/core';
import { platformBrowserDynamic } from '@angular/platform-browser-dynamic';

import { AppModule } from './app/app.module';
import { environment } from './environments/environment';

declare var __webpack_public_path__: string;
const sv = (<any>window).sv;

if (environment.production) {
  enableProdMode();
  if (sv && sv.resource) {
    __webpack_public_path__ = sv.resource + '/';
  }
}


platformBrowserDynamic().bootstrapModule(AppModule)
  .catch(err => console.error(err));
```

2. You must change the output hashing in Angular.json. By default, when the application is built, unique hash keys are assigned to all the scripts preventing certain caching mechanisms in the browser. This is not required in Salesforce and may cause issues. To prevent such issues, you must set the outputHashing parameter in the angular.json file to ***none*** for your build.


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3. Build your application using angular cli. The angular cli provides an easy script to build your application. Simply run the following replacing production with whatever configuration you are using.

```
ng build --configuration="production"
```

4. After the application is built, an output folder called ***dist*** with the entire contents of your application in various resource files is created.


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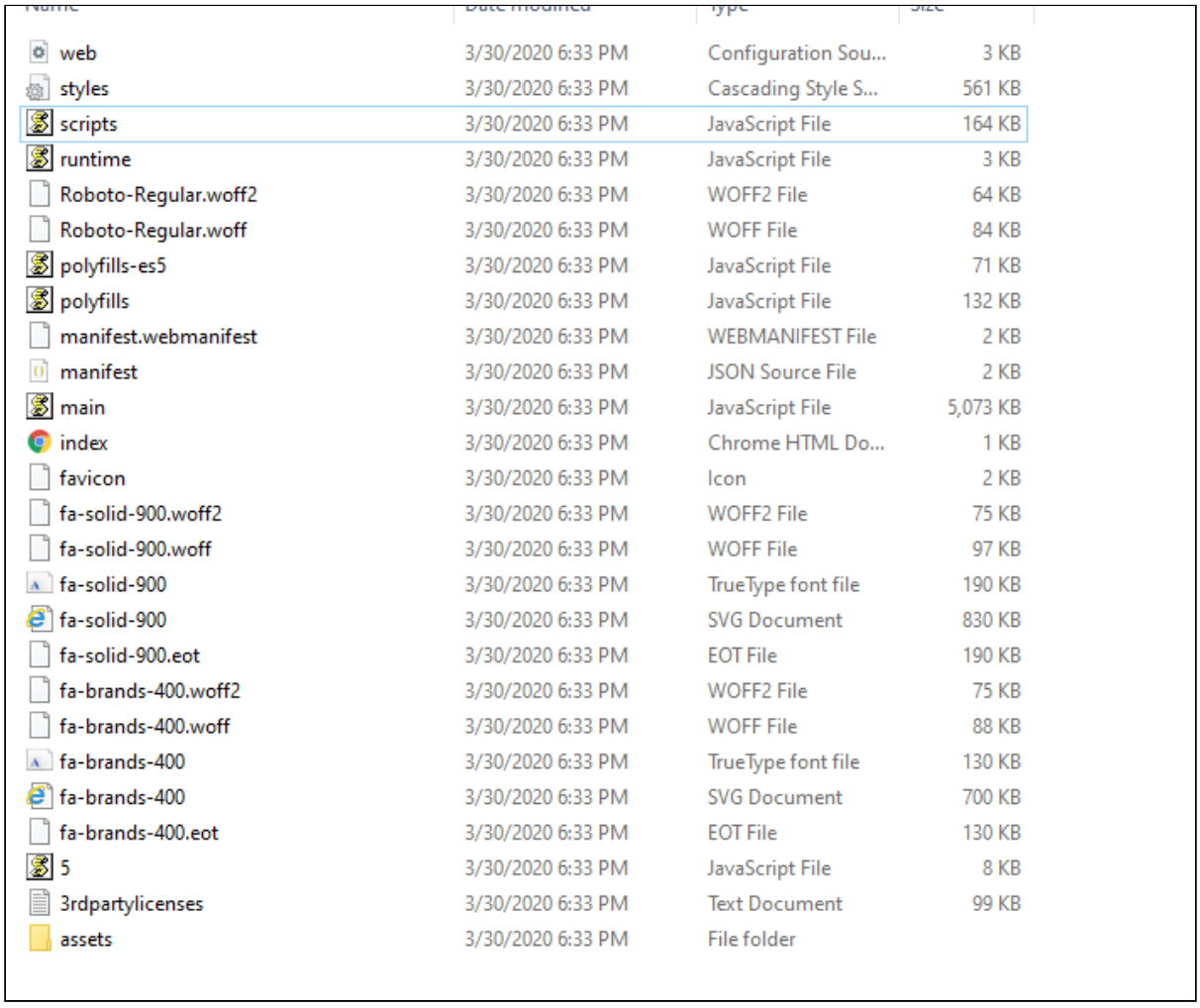
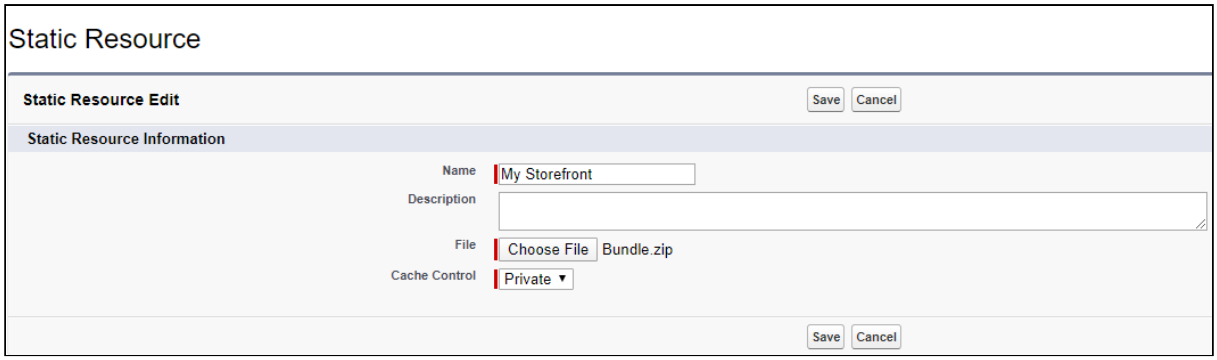


| Name | Date modified | Type | Size |
|---|---|---|---|
| web | 3/30/2020 6:33 PM | Configuration Sou... | 3 KB |
| styles | 3/30/2020 6:33 PM | Cascading Style S... | 561 KB |
| scripts | 3/30/2020 6:33 PM | JavaScript File | 164 KB |
| runtime | 3/30/2020 6:33 PM | JavaScript File | 3 KB |
| Roboto-Regular.woff2 | 3/30/2020 6:33 PM | WOFF2 File | 64 KB |
| Roboto-Regular.woff | 3/30/2020 6:33 PM | WOFF File | 84 KB |
| polyfills-es5 | 3/30/2020 6:33 PM | JavaScript File | 71 KB |
| polyfills | 3/30/2020 6:33 PM | JavaScript File | 132 KB |
| manifest.webmanifest | 3/30/2020 6:33 PM | WEBMANIFEST File | 2 KB |
| manifest | 3/30/2020 6:33 PM | JSON Source File | 2 KB |
| main | 3/30/2020 6:33 PM | JavaScript File | 5,073 KB |
| index | 3/30/2020 6:33 PM | Chrome HTML Do... | 1 KB |
| favicon | 3/30/2020 6:33 PM | Icon | 2 KB |
| fa-solid-900.woff2 | 3/30/2020 6:33 PM | WOFF2 File | 75 KB |
| fa-solid-900.woff | 3/30/2020 6:33 PM | WOFF File | 97 KB |
| fa-solid-900 | 3/30/2020 6:33 PM | TrueType font file | 190 KB |
| fa-solid-900 | 3/30/2020 6:33 PM | SVG Document | 830 KB |
| fa-solid-900.eot | 3/30/2020 6:33 PM | EOT File | 190 KB |
| fa-brands-400.woff2 | 3/30/2020 6:33 PM | WOFF2 File | 75 KB |
| fa-brands-400.woff | 3/30/2020 6:33 PM | WOFF File | 88 KB |
| fa-brands-400 | 3/30/2020 6:33 PM | TrueType font file | 130 KB |
| fa-brands-400 | 3/30/2020 6:33 PM | SVG Document | 700 KB |
| fa-brands-400.eot | 3/30/2020 6:33 PM | EOT File | 130 KB |
| 5 | 3/30/2020 6:33 PM | JavaScript File | 8 KB |
| 3rdpartylicenses | 3/30/2020 6:33 PM | Text Document | 99 KB |
| assets | 3/30/2020 6:33 PM | File folder | |

5. Create a static resource. After the contents of the application is built, you must bundle it and deploy it to a Salesforce static resource. Select all of the build files and put them into a zip file with a name of your choice.
6. Go to **Setup > Develop > Static Resources** and click **New** to create a new static resource with the zip file as its contents.




7. Create the Visualforce Page. After the static resource has been created, you must create a visualforce page to display the contents of the resource file. See the example visualforce page below you can use to host your application. You can make any changes you want, but there are a couple of considerations: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- You must add the script to assign the *window.sv.resource* variable to the URL of the static resource.
- Remove the base tag or assign it to the relative URL of the community.
- Replace *Resource.ECommerce* in the below template with the name of the static resource file you uploaded.

```
<apex:page standardStylesheets="false" showHeader="false" sidebar="false" docType="ht
ml-5.0" applyHtmlTag="false" applyBodyTag="false">
  <head>
    <meta charset="utf-8" />
    <title>ECommerce</title>

    <meta name="viewport" content="width=device-width, initial-scale=1" />
    <link rel="icon" type="image/x-icon" href="favicon.ico" />
    <link rel="manifest" href="manifest.webmanifest" />
    <meta name="theme-color" content="#1976d2" />
    <link rel="stylesheet" href="{!URLFOR($Resource.ECommerce, 'styles.css')}" />
    <script>
        window.sv = {
            resource: '{!URLFOR($Resource.ECommerce)}/'
        };
    </script>
  </head>

  <body>
    <app-root></app-root>
    <noscript
      >Please enable JavaScript to continue using this application.</noscript
    >
    <script src="{!URLFOR($Resource.ECommerce, 'runtime.js')}"></script>
    <script src="{!URLFOR($Resource.ECommerce, 'polyfills-es5.js')}"></script>
    <script src="{!URLFOR($Resource.ECommerce, 'polyfills.js')}"></script>
    <script src="{!URLFOR($Resource.ECommerce, 'scripts.js')}"></script>
    <script src="{!URLFOR($Resource.ECommerce, 'main.js')}"></script>
  </body>
</apex:page>
```

# Customizing Your Application

In this Section


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- Customizing HTML Content and Standard Components
- Adding Custom Fields on Object Models
    - Adding Custom Attributes to a Product
- Customizing Logic in the Services
- Customizing the Template Page with Custom Field
- Search Engine Optimization
- Using Custom Objects Through APIs
- Useful Tips for Turbo Enabled Catalog


# Customizing HTML Content and Standard Components

You can override the HTML for any component that comes with your angular application. You can do so by writing an extension component. Similarly, you can override the methods within it as well. For example, there is a registration method and you want to retain it but want to change the look and feel of the template, you must write an extension component. You can override extension classes, extension services, or extension components that are present within the angular library.

## To customize the HTML content

1. Go to the **header.component.html** file and browse for the **apt-mini-profile** component. The HTML content is all bundled into this component.
2. Go to your application and use basic angular syntax to generate a component. For example: ng g c components/my-profile --module-components/component.module.ts --spec-false
3. A new my-profile.component.ts is created.
4. Import the miniprofile component from @apttus/ecommerce and extend the miniprofile component. By doing this, all the controller code is inherited from the


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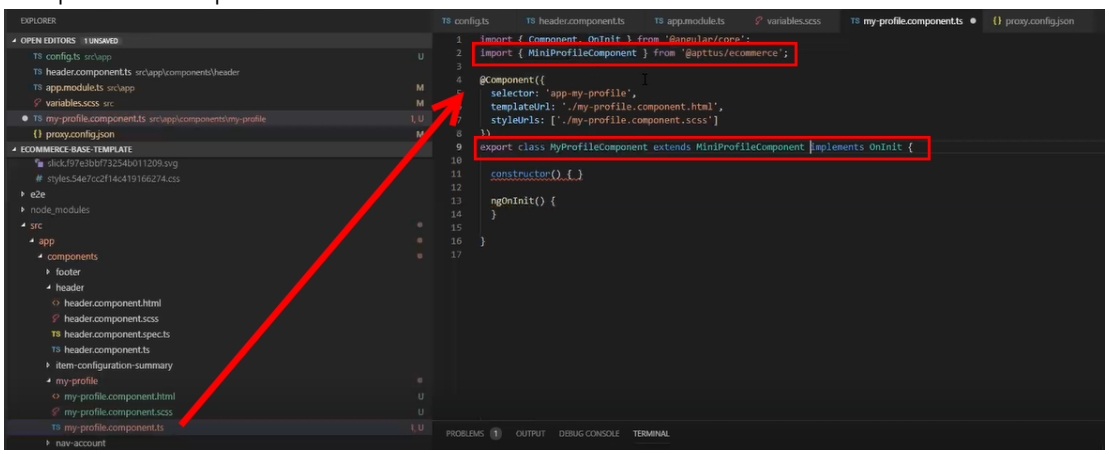
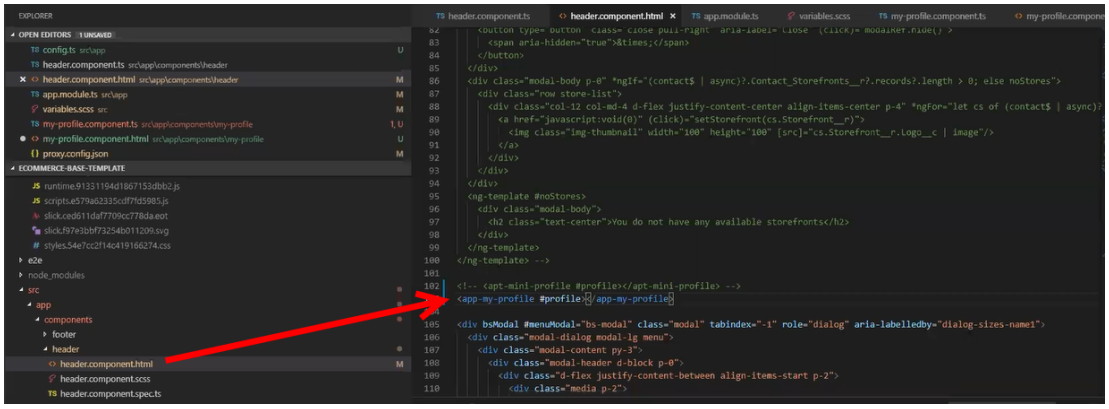
miniprofile component.




5. Refer to the Digital Commerce SDK and search for miniprofilecomponent. Click on the Template tab for the HTML template for all of the components in it.
6. Copy all the HTML content and paste it in the my-profile.component.html you just created and save it.
7. From the new component you just created, copy the selector and go to the header where it is referenced and paste the selector.




8. Run ng serve command.

The profile component is overridden.

Go to my-profile.component.html and within the HTML content add a custom field and save.

Refresh your application on the local machine and you will see the newly added custom field. If you want to assign the custom field to a user that is associated with the component, you can do so by modifying the ngModel. For example: [(ngModel)]="user.My_Custom_field__c"

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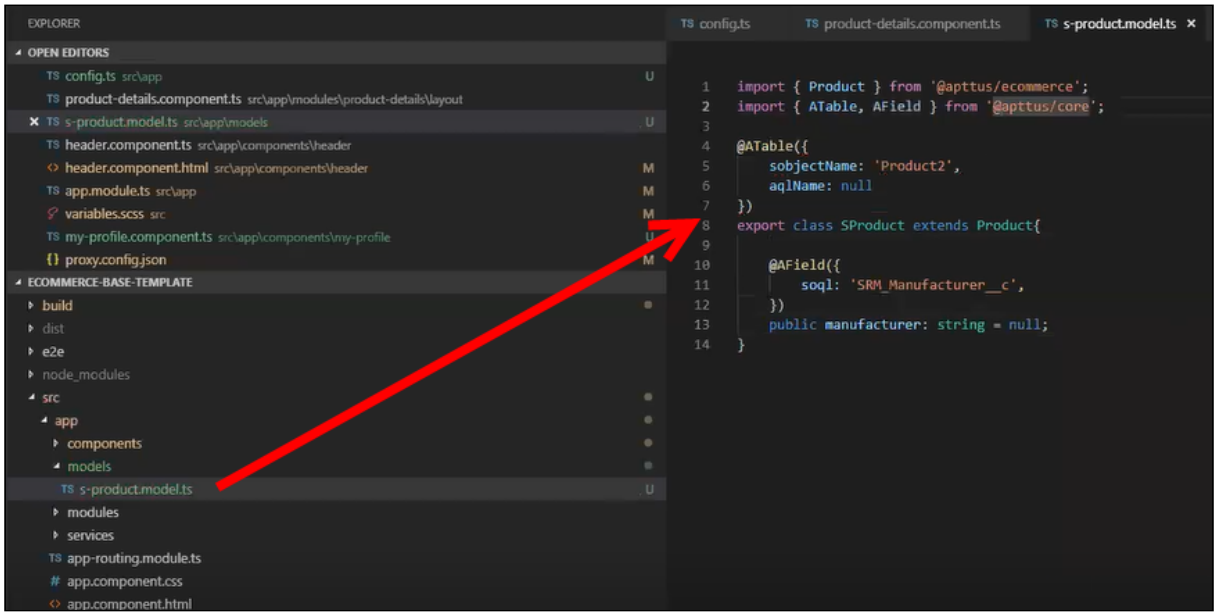
# Adding Custom Fields on Object Models

You can add custom fields to a modal by using the extended model in components. The strategy to add customization to the application is to use the object-oriented nature of typescript to extend and override the out-of-the-box content. Let us see how to add a custom field to the Product object.

## To create a custom model

1. Right-click on the App folder and click **Create Folder** to create a new folder for models and name it. For example models.
2. Right-click on the model's folder and click **Create File** to create a product model and name it. For example s-product.model.ts
3. In the s-product.model.ts, import Product from @apttus/ecommerce. For example: import { Product } from @apttus/ecommerce
4. Create the extension of the product for your custom model.
   For example, export class SProduct extends Product {}. The SProduct class has all the properties of the original product.




Example for option group lookups to fetch the option products: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```
import { ATable, AField } from '@apttus/core';
import {
  Product,
  ProductOptionComponent,
  ProductOptionGroup,
} from '@apttus/ecommerce';
import { Expose, Type } from 'class-transformer';

@ATable({
  sobjectName: 'Product2',
  aqlName: null,
})
export class SProduct extends Product {
  @Expose({
    name: 'APTS_Additional_Info__c',
  })
  AdditionalInfo: string = null;
  @Expose({
    name: 'APTS_Estimated_Delivery_Days__c',
  })
  EstimatedDeliveryDays: string = null;

  @Type(() => SProductOptionGroup)
  @Expose({ name: 'Apttus_Config2__OptionGroups__r' })
  OptionGroups: Array<SProductOptionGroup>;
}
```

```
export class SProductOptionGroup extends ProductOptionGroup {
  @Type(() => SProductOptionComponent)
  @Expose({ name: 'Apttus_Config2__Options__r' })
  Options: Array<SProductOptionComponent>;
}
export class SProductOptionComponent extends ProductOptionComponent {
    @Expose({ name: 'Apttus_Config2__ComponentProductId__r' })
    @Type(() => SProduct)
    ComponentProduct: SProduct;
}
```

5. When adding custom properties to your model, you must associate the following decorators from the @apttus/core library. These are used to map your classes to the underlying Salesforce objects. Basically, this mechanism is to map typescript classes with Salesforce objects using decorators.
    - ATable - This is used to map product class to any object on the backend by specifying what object you want to map it up to. For Salesforce, the object name can be added to the field sobjectName.
    - AField - This is used to specify the Salesforce name of the custom field. For example: SRM_Manufacturer__c. It is not necessary to use the Salesforce syntax for the field name. You can provide a generic name. For example manufacturer.


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You must specify a default value for any field created. Do not leave a blank value.

- Expose - This is used to specify the Salesforce name of the custom field. For example: Apttus_Config2__ComponentProductId__r. This is applicable only for a few models when trying to extend instead of using AField. You must specify a default value for any field created. Do not leave a blank value.

> The alias flag is turned off for all the cart services. This avoids normalization of the fields at the backend that takes a lot of processing time to convert API names to alias names. The response for all the cart actions is with API names instead of the alias name.

  - Category
  - Classification
  - PriceListCategory
  - ProductAttributeGroupMember
  - ProductAttributeGroup
  - ProductAttribute
  - ProductFeature
  - ProductGroup
  - ProductOptionGroup
  - ProductTranslation
  - Product
  - PriceListItem
  - PriceList
  - CartLineitem
  - AdjustmentLineitem
  - Incentive
  - SummaryGroup
  - TaxBreakup
  - TaxCode
  - Cart
  - AppliedRuleActionInfo
  - AppliedRuleInfo
  - Account
  - AssetLineitem
  - OrderLineitem
  - Order
  - QuoteLineitem
  - Quote


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- Type - This is used to determine relationship types (child or lookups). It is recommended to also set the default value to 'null' on all attributes unless a default value is explicitly needed.

```
// Model syntax summer '19
@ATable({
    sobjectName: 'Apttus_Config2__ProductConfiguration__c'
    // aqlName is optional
    // aqlName: 'LineItem'

    // Dynamic attribute has been added to generate model at runtime
    // Use for highly dynamic objects like ProductAttributeValue
    dynamic: true
})
export class CustomCart extends Cart {
    // Standard field
    @AField({
        soql: 'Apttus_Config2__ProductId__c',
        aql: 'ProductId'
    })
    productId: string = null;

    // Lookup Field
    @AField({
        soql: 'Apttus_Config2__ProductId__r',
        aql: 'ProductId'
    })
    @Type(() => Product)
    product: Product = null;

    // Child Field
    @AField({
        soql: 'Apttus_Config2__LineItems__r',
        aql: 'LineItems',
        // New flag to tell SDK to run additional queries to populate line item data.
        expand: 'shallow'
    })
    @Type(() => LineItem)
    LineItems: Array<LineItem> = null;
```

Now that you have created your custom product model, mapped the typescript class to the Salesforce object Product2, and provided custom fields, you must map it back to the service. The product service looks up at the product class. You can override that using a setType method that is available on every single service. This method should be created in the constructor of the component. This changes the mapping of that service to the model that you want to use. Once this is done within your application or within your module, the method gets applied to every other component within your module. Now pass it in the class reference of the class you just created. For details, refer to the image below.


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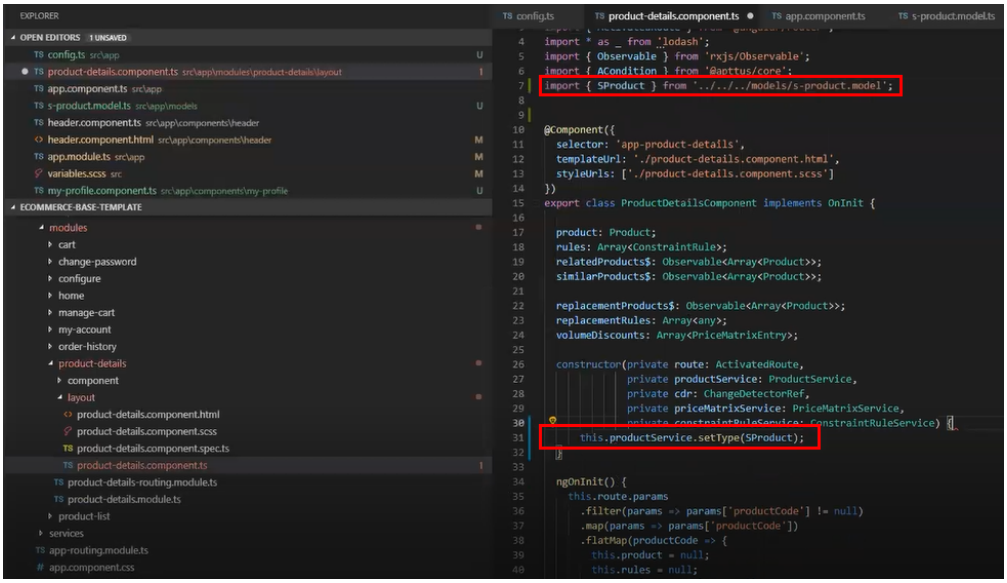


# Adding Custom Attributes to a Product

You can add custom attributes on any product in the product details page through the product attribute model that contains all the product attributes.


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## To add a custom attribute to a product

1. You must import the product attribute model from the E-Commerce library into the product attribute value service.

```
@ATable({
    sobjectName: 'Apttus_Config2__ProductAttributeValue__c',
    aqlName: 'cpq_ProductAttributeValue'
})
export class ProductAttributeValue extends AObject {
    @AField({
        soql: 'Apttus_Config2__BillingOffsetDays__c',
        aql:'BillingOffsetDays'
    })
    BillingOffsetDays: number = null;
    @AField({
        soql: 'Apttus_Config2__Color__c',
        aql:'Color'
    })
    Color: string = null;
    @AField({
        soql: 'Apttus_Config2__LineItemId__c',
        aql:'LineItemId'
    })
    LineItemId: string = null;
    @AField({
        soql: 'Apttus_Config2__Vendor__c',
```

2. In the @Table decorator, you must set the Dynamic flag to *True*.

```
You, 5 months ago | 2 authors (Vishal Bhan and others)
1   import { AObject, ATable, AField } from '@apttus/core';      Vishal Bh
2
    You, 5 months ago | 2 authors (Vishal Bhan and others)
3   @ATable({
4       sobjectName: 'Apttus_Config2__ProductAttributeValue__c',
5       aqlName: 'cpq_ProductAttributeValue',
6       dynamic: true
7   })
8   export class ProductAttributeValue extends AObject {
9       @AField({
10          soql: 'Apttus_Config2__LineItemId__c',
11          aql:'LineItemId'
12      })
13      LineItemId: string = null;
14  }
```

The following objects have the dynamic flag set to true, by default.

a. ProductAttributeValue
b. OrderAttributeValue


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c. QuoteAttributeValue
d. AssetAttributeValue

# Customizing Logic in the Services

Your application is built around the concept of Modals and Services and pairing the two to work together. You can do one or more of the following:

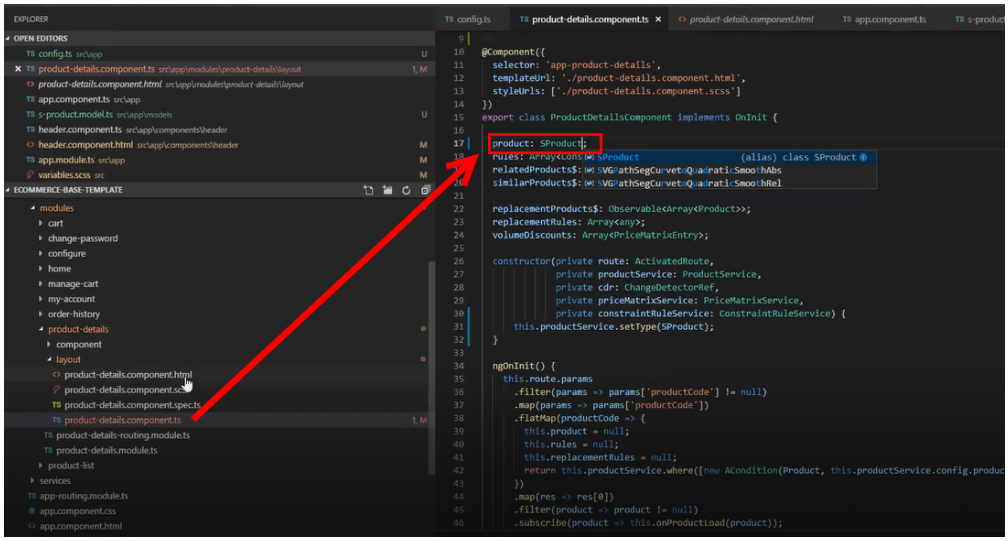
- Change the modal that goes with some business logic and service
- Change the business logic or service for a particular modal
- Create completely new modals and new services

# Customizing the Template Page with Custom Field

You can use the custom field you just created in your template.

## To customize the template page

1. Go to product-details.component.ts and modify the product name with your custom field name.





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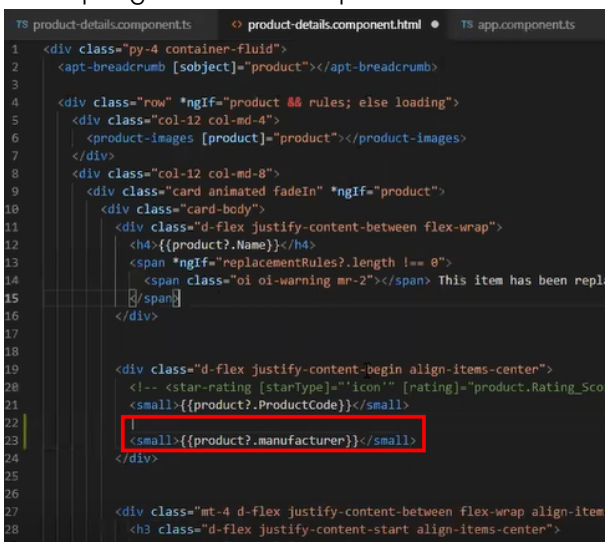
2. Go to the product-details.component.html and add an entry for your custom field to be displayed on the template.




3. Your template displays the new custom field.

# Search Engine Optimization

All B2C customers need the capability to publish their product list and product detail pages to Google search engine so that they can be searchable and linkable. The UI template loads data asynchronously and Angular renders the data retrieved from Salesforce.com.

Follow the steps below to enable Google search to crawl a Digital Commerce website by creating a sitemap index, dynamic sitemap's and register them with Google.

## Step 1: Create a robots.txt file and set it in the Community page

```
<apex:page contentType="text/plain" showHeader="false">
User-agent: *
Disallow: /<store name>/cart?
Disallow: /<store name>/manage-cart?
Disallow: /<store name>/Orders?
Disallow: /<store name>/installed-products?
Disallow: /<store name>/my-account?
Sitemap: http://<domain>/<store name>/APTSSiteIndex
```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```
</apex:page>
```

## Step 2: Create a APTSSiteIndex Visualforce page

Create a APTSSiteIndex Visualforce page that renders the XML as below.

Pre-requisite: There must be 2 existing sitemaps, one for all products and one for all categories.

```
<?xml version="1.0" encoding="UTF-8"?>
<urlset xmlns="http://www.sitemaps.org/schemas/sitemap/0.9">
  <url>
    <loc>http://<domain>/<store name>/APTSSiteMapProducts</loc>
    <lastmod>2019-10-06</lastmod>
  </url>
  <url>
    <loc>http://<domain>/<store name>/APTSSiteMapCategories</loc>
    <lastmod>2019-10-06</lastmod>
  </url>
</urlset>
```

## Step 3: Create a APTSSiteMapProducts Visualforce page

Create a APTSSiteMapProducts VF page that will generate all the Active Products. Each Sitemap can only have 10K urls.

**Sample Output**

```
<?xml version="1.0" encoding="UTF-8"?>
<urlset xmlns="http://www.sitemaps.org/schemas/sitemap/0.9">
  <url>
    <loc>http://<domain>/<store name>/APTSProduct?id=<productcode></loc>
    <lastmod>2019-10-06</lastmod>
  </url>
</urlset>
```

The APTSProduct renders the following html data.


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**HTML Data**

```
<html>
<head>
<title>Executive Anvil</title>
<script type="application/ld+json">
{
  "@context": "https://schema.org/",
  "@type": "Product",
  "name": "Executive Anvil",
  "url": "https://example.com/anvil",
  "image": [
    "https://example.com/photos/1x1/photo.jpg",
    "https://example.com/photos/4x3/photo.jpg",
    "https://example.com/photos/16x9/photo.jpg"
   ],
  "description": "Sleeker than ACME's Classic Anvil, the Executive Anvil is perfect
for the business traveler looking for something to drop from a height.",
  "sku": "0446310786",
  "offers": {
    "@type": "Offer",
    "url": "https://example.com/anvil",
    "priceCurrency": "USD",
    "price": "119.99",
    "priceValidUntil": "2020-11-05"
  }
}
</script>
</head>
<body>
</body>
</html>
```

# Using Custom Objects Through APIs

Digital Commerce generic APIs support custom objects by replacing the :custom_object__c with the custom object API name into the URL path as shown in the example below:

[GET] .../apexrest/Apttus_WebStore/apttus/v3/:custom_object__c

[POST] .../apexrest/Apttus_WebStore/apttus/v3/:custom_object__c /query


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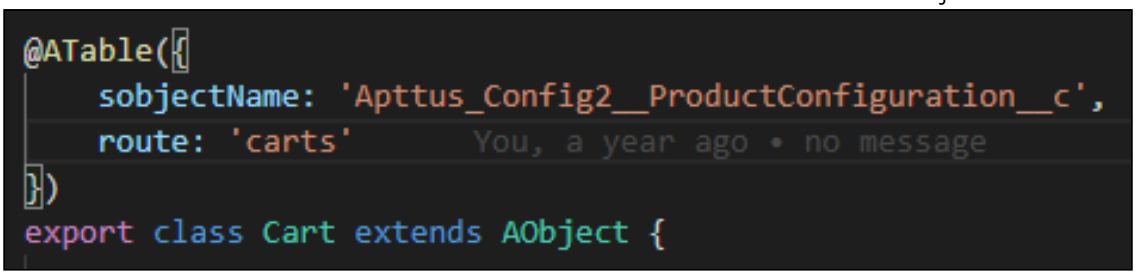
You need to ensure that the SDK utilizes these APIs for custom services and models by following the steps below:

1. Create a custom object in Salesforce and add some custom fields.
    a. The custom object must have at least one lookup to another object.
    b. The other object must have a lookup to this custom object as a child object. You can just enable attachments for this object.
2. Open a template and install the latest SDK libraries.
3. Create a service and model for the custom object created in step 1.
    a. You may need to add the 'route' attribute to the ATable decorator similar to what was done in 'cart' and set it to the API name of the custom object:




4. Verify that all the methods within the service work:
    a. query
    b. where
    c. search
    d. aggregate
    e. describe
    f. get
    g. fetch
    h. delete
    i. create
    j. update
    k. upsert
5. Verify that relationships work on the model.
    a. The lookup you created in step 1 should be pulled.
    b. The model should be able to pull the child object with attachments.

# Useful Tips for Turbo Enabled Catalog

Digital Commerce catalog leverages Turbo enabled catalog APIs for better performance. For optimal results, you must keep the following in mind:

- While implementing the Digital Commerce application, you can choose the product fields based on which the catalog search works. For better performance, you must limit the number of searchable fields to 3.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- The performance may degrade if long text fields like Product Description are made searchable.
- It is recommended to keep the number of custom fields on the product model less. Too many custom fields on the product model may degrade performance.

# FAQs Tips and Known Issues

This section provides answers to some of the frequently asked questions, lists few tips for usability and known issues with workarounds that exist in the application.

## Frequently Asked Questions

**How secure is the data stored in JavaScript cache from vulnerability? What kind of security standards are used in handling cache?**

All caching happens in JavaScript memory. Hashing and compression is used with garbage collection. JavaScript memory is cleared out as soon as the user leave the browser session. We do not store any data in the local storage in browser such as cookies etc.

**How is the data transmission secured between client API and Server Rest API?**

Conga Digital Commerce SDK uses encrypted communication between client and server using AES 128 encryption. Also, have timestamped endpoint and are valid only for 30 seconds. If it takes more time then the request is not valid.

**How is data protected from Cross site Scripting (XSS)?**

To systematically block XSS bugs, Conga Digital Commerce treats all values as untrusted by default. When a value is inserted into the DOM whether it's from a template, property, attribute, binding, or interpolation, angular sanitizes and escapes untrusted values.

**How is data protected from SQL Injection attack?**

Digital Commerce sanitizes user input before it is converted to query and send to the server such as escape special characters etc.

**How secure is the user login from Angular to Salesforce Server? How is the session's secured from any intruder attack?**

Use standard salesforce standard authentication using an access token. Use standard OAuth protocol to generate an access token. Also, go through communities security for data access.


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**How secure are the queries triggered from Angular Client API to Salesforce for Search, Product details etc..?**

All user input is sanitized and a custom parser in SDK is used to generate queries. Salesforce E-Commerce interface has further validation on SQL queries, on the server-side before data is accessed from Salesforce.

**What best practices should be followed, when SDK components & services are extended or customized to avoid exposing any security vulnerability?**

Setup strong security model as the salesforce org level using standard salesforce security framework (roles, profiles, permission sets etc.). SDK does not circumvent Salesforce security in any way.

Use standard SDK mechanisms for extending services, models, interface for any customization without circumventing the SDK architecture to integrate and interface with Salesforce.

# Tips

**Getting error while placing an order?**

While placing an order, an error is displayed.

Check the following setting:

1. Go to **Setup** and in the **Quick Find box**, type *Custom Settings*.
2. Click **Custom Settings** and click **Manage** next to *Config System Properties*.
3. Click **Edit** next to *System Properties*.
4. Ensure that the *Run Misc Finalization Task In Async Mode* flag is set to **False**.
5. Click **Save**.

**Want to add more than 250 cart line items?**

You can follow the workaround to add more than 250 cart line items.

> ⚠ This workaround is for Digital Commerce Turbo implementation only.

You can test the workaround with additional 50 cart line items. Before you do that you need to change the page size from 250 to 400 in the *DCTurboConnection* class.

```
String response = this.doGet('/pricing/carts/' + cartId + '/lines?
includeAdjustments=true&pageSize=250&getResponseOnPriceComplete=true' + lineQueryParam);
String response = this.doGet('/pricing/carts/' + cartId + '/lines?
includeAdjustments=true&pageSize=400&getResponseOnPriceComplete=true' + lineQueryParam);
```

Now, start by incrementing with 50 cart line items first. Test it on your org. If the test is successful, test further with another 50 cart line items. Continue to add additional cart line


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items until you hit the Salesforce system limitations. Depending on the complexity of items (number of constraint rules at bundle or cart level execution or too many fields/custom fields on each line item) in your cart the maximum number of line items may vary.

> This may or may not work depending on your org limitations.

Alternately, based on line items count you can pass the pageSize and pageNumber dynamically.

For example, if you have 375 line items, try the following:

pageSize=250&pageNumber = 1

pageSize=175& pageNumber = 2.

**Catalog page takes a long time to load?**

Try clearing your browser storage before first time usage.

# Contact Support

If you experience an issue with a product and need help, you can contact the Conga Support. Before you contact the support team, prepare a brief description of the problem you are experiencing. Additionally, to enable us to resolve your problem at the earliest, provide the following important information:

- What is the environment in which you are experiencing the problem: Sandbox or Production?
- How many users are affected?

**Which product versions are installed?**

To determine version numbers:

1. Go to **Setup >** in the *Quick Find Box*, search and select **Installed Packages**.
2. In the Installed Packages section, all the installed packages are displayed. You can find the version numbers in the Version Number column.


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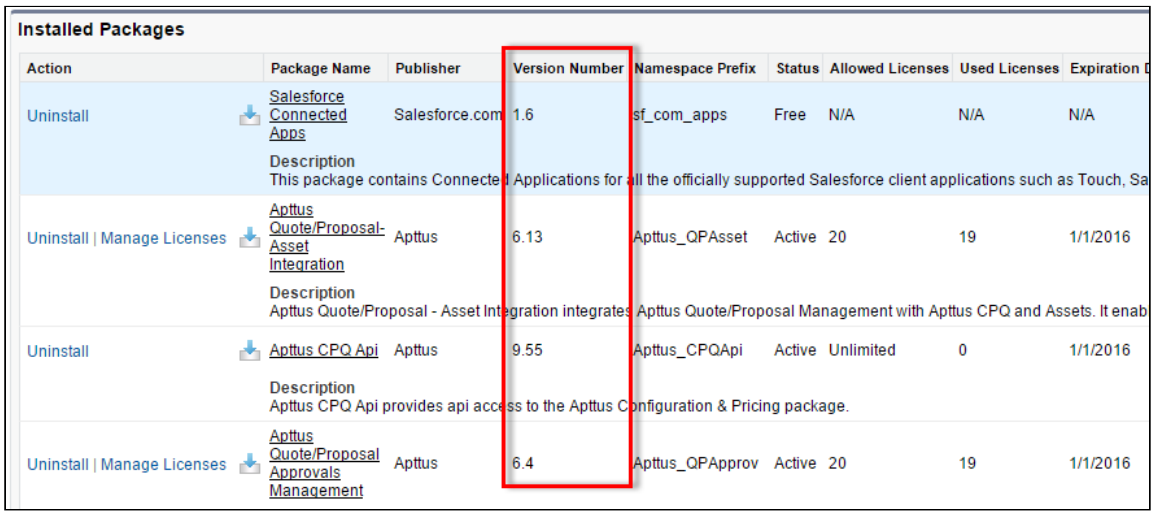



**What is your Salesforce.com Organization ID?**

To determine the Salesforce.com organization ID:

1. Go to **Setup** > in the *Quick Find Box*, search and select **Company Information**.
2. From the Organization Detail pane, provide the **Salesforce.com Organization ID**.

**If you are having issues generating documents, what is your merge server end point?**

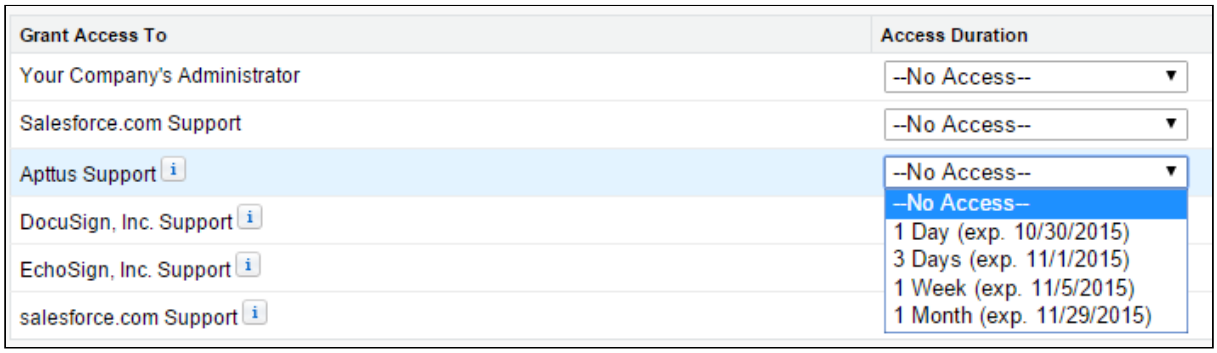
To find the merge server end point:

1. Go to **Setup** > in the *Quick Find Box*, search and select **Custom Settings**.
2. Click **Manage** for Comply System Properties.
3. Click **System Properties**.
4. The **Merge Webservice Endpoint** field displays the setting.

**Grant Login Access of the affected user and an administrator.**

To grant login access:

1. Go to **Setup** > in the *Quick Find Box*, search and select **Grant Login Access**.
2. From the **Apttus Support** picklist, select an option for access duration.




3. Click **Save**.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# Digital Commerce for Users

This section describes how Digital Commerce works and how customers can quickly select products and checkout having a seamless purchasing experience.

| Topic | Description |
|---|---|
| What's Covered | This section is designed to provide users with information on features and related user interactions to be consumed within Digital Commerce. This section 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 | For information pertaining to the requirements and recommendations, see System Requirements and Supported Platforms Matrix. |
| Updates | For a comprehensive list of updates for each release, see What's New in Digital Commerce Documentation. |
| Other Resources | • See Digital Commerce for Administrators for implementation and deployment procedure.<br>• See Digital Commerce SDK for technical instructions on the installation and setup of a Digital Commerce storefront.<br>• See Digital Commerce for REST API Developers for details of the CPQ REST APIs consumed by Digital Commerce.<br>• See CPQ documentation for detailed information on setting up the master data. |

This section 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

Select one of the following topics for more information:


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- Launching Digital Commerce
- Managing Accounts
- Browsing the Catalog
- Managing the Cart
- Creating a Quote
- Managing Assets
- Applying Promotions on the Products in the Shopping Cart
- Comparing Product Features


# Launching Digital Commerce

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

- You can quickly navigate to your product through the Category Hierarchy on the left side of the landing page. You can choose any from related categories, subcategories, or product family.


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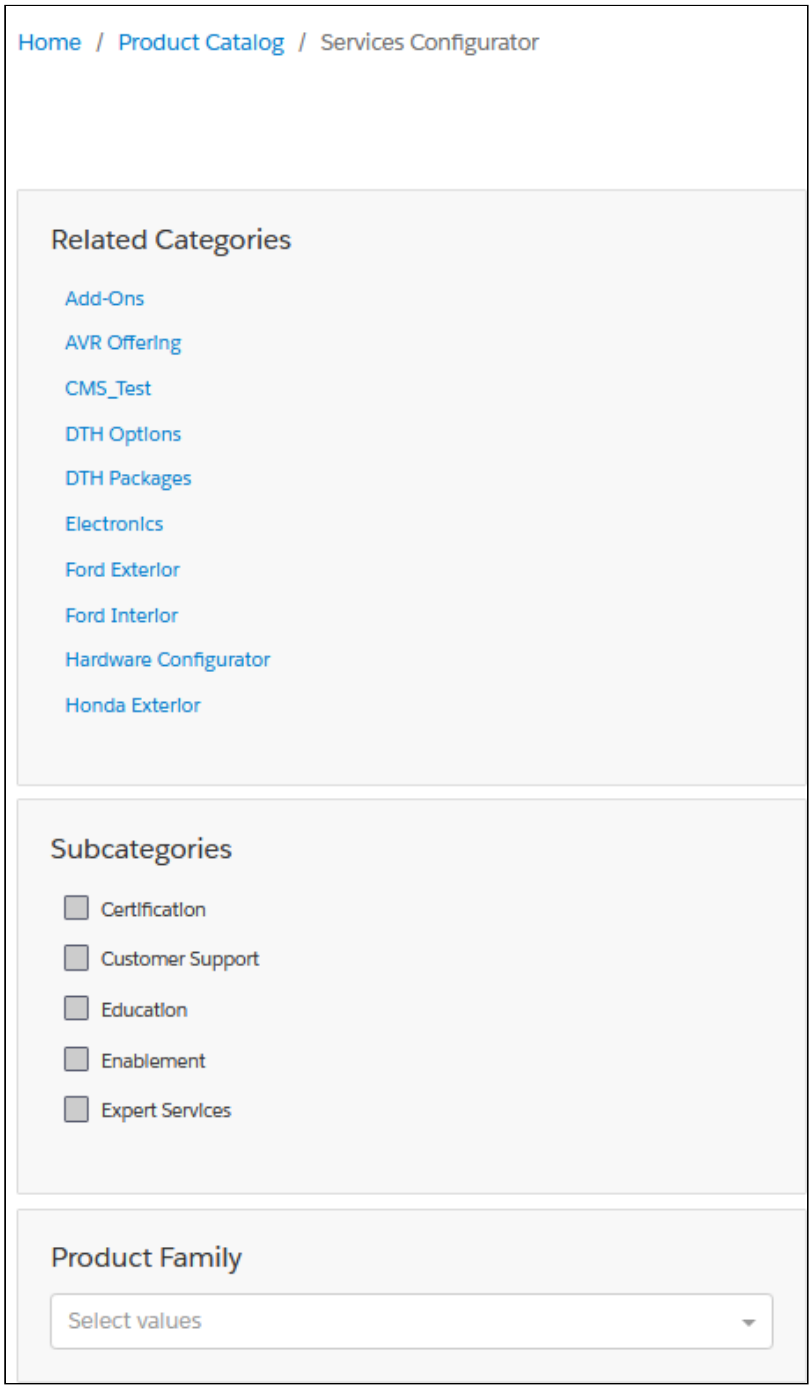


- The header section on the top provides capabilities such as Account management, managing Installed Products, product search, and mini cart.


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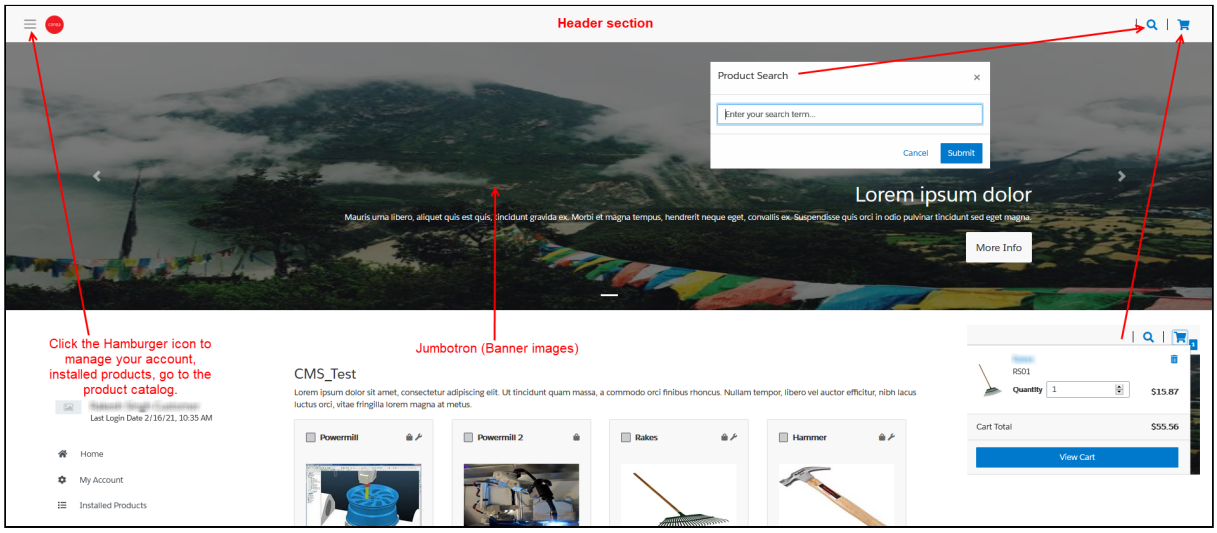
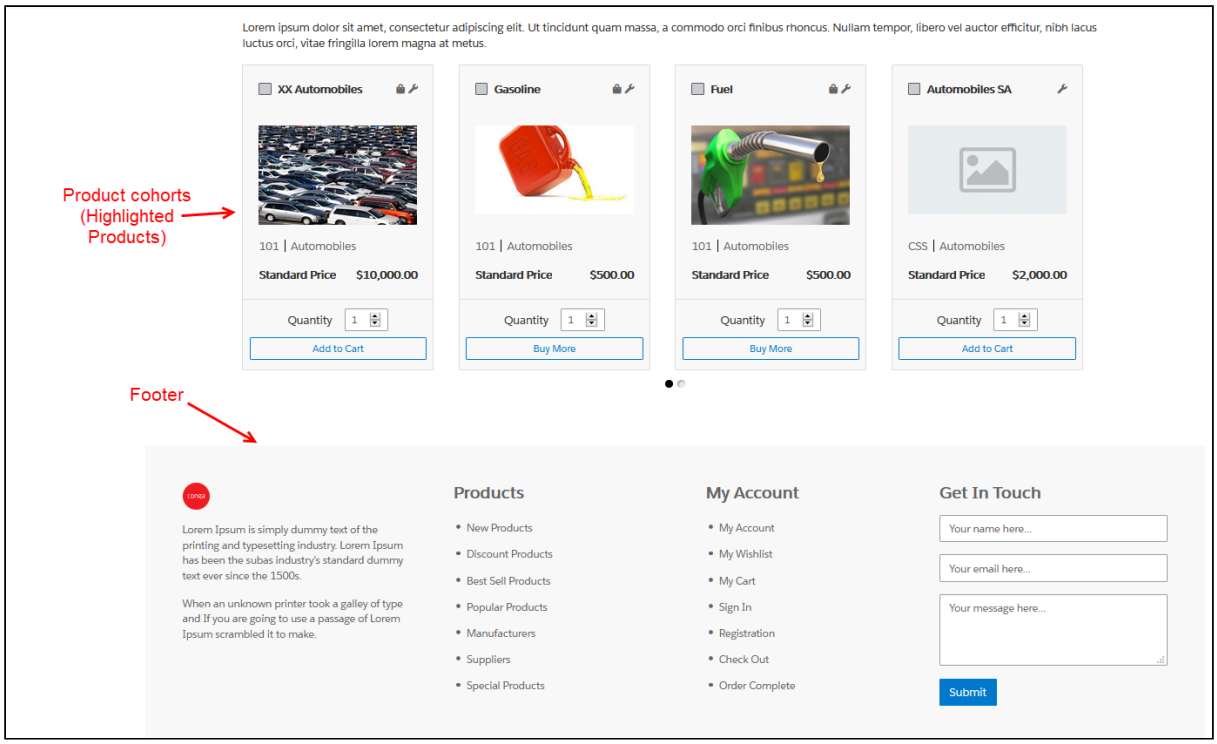



- Jumbotron (Banner Images)
- Product Cohorts (Highlighted Products)
- Navigate to other features through the Footer




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 tasks:

- Launch Digital Commerce
- View banners and highlighted products
- Browse the catalog page, navigate through Category Hierarchy, and add to cart.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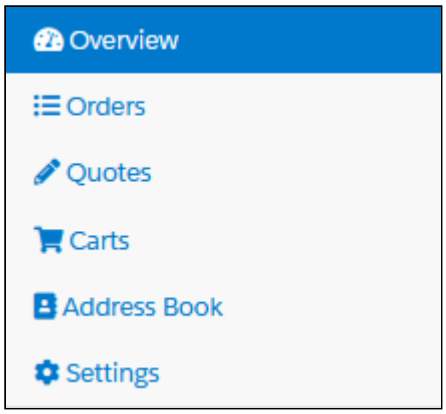
- Use text search to search and select a product or product family
- View the product details along with its configuration and attachments, if any
- Configure complex products as follows:
    - Multi-Level Bundles (Nested Bundles)
    - Options & Attributes Configuration
        - Product Level Attributes
        - Option Level Attributes
- If you have Promotions enabled, you can:
    - Auto-apply applicable promotions to the items selected in the cart
    - View applied promotion details in cart
    - Apply manual promotions based on coupons in the cart
- View Constraint Rules and add to the cart from the Catalog page
- Compare more than one product features and add it to the cart directly from the Compare Products page
- View and manage mini cart
- Checkout of cart

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

- Log in to Digital Commerce
- Access your account page to:




    - View list of orders and open them to view their details
    - View list of quotes and their details, you can also edit existing quotes
    - View Carts and their statuses
    - View all addresses in your address book
    - Use the settings option to view your account information and change password
- Browse the catalog page, navigate through Category Hierarchy, and add to cart.
- Configure products as follows:
    - Multi-Level Bundles (Nested Bundles)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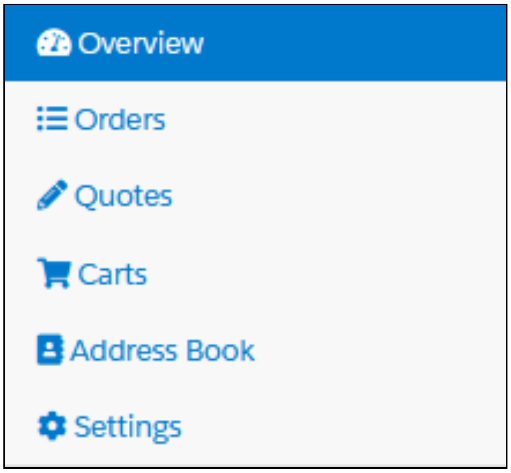
    - Options & Attributes Configuration
        - Product Level Attributes
        - Option Level Attributes
- If you have Promotions enabled, you can:
    - Auto-apply applicable promotions to the items selected in the cart
    - View applied promotion details in cart
    - Apply manual promotions based on coupons in the cart
- View Constraint Rules and add to the cart from the Catalog page
- Compare more than one product features and add it to the 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
- Request a Quote

# 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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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:

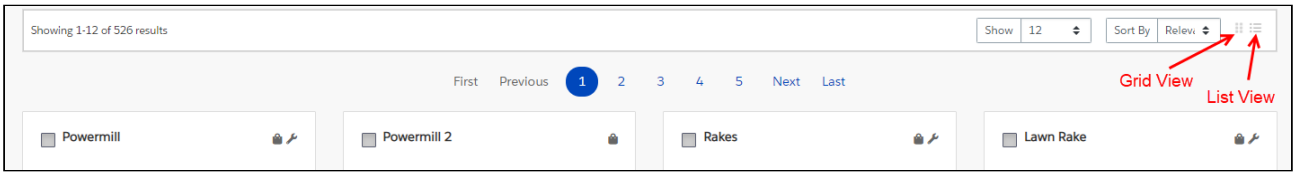
- View Account Details
- View or modify User Information
- Change Password

# Browsing the 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 displays the products available for purchase and also displays their details like the product's name, price, specification. You can also add products to the cart from the catalog page. The product catalog has many features to make searching and selecting products easy for the users.

## View Options

On the product catalog, 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.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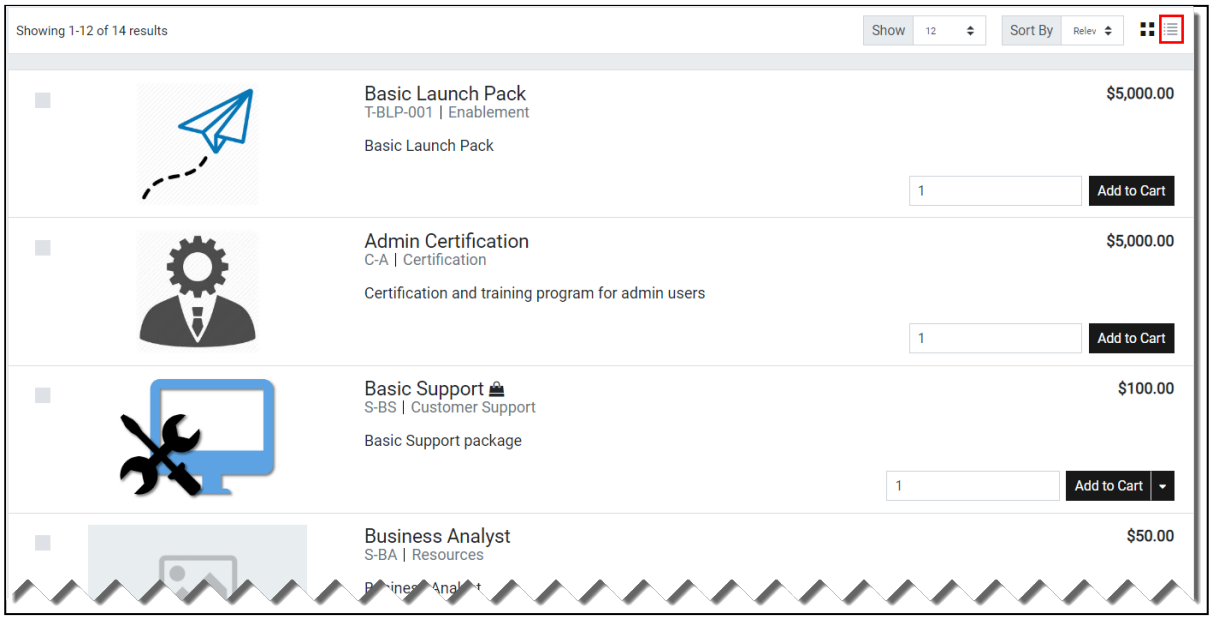
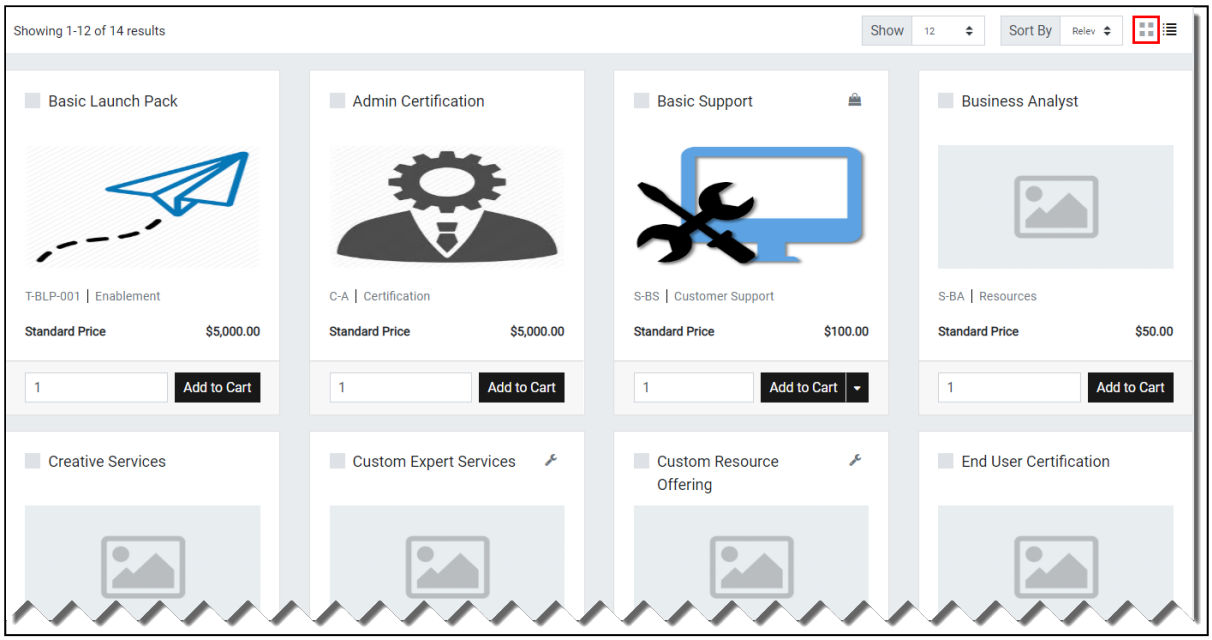



- **Grid View**: To select the grid view, click the grid view icon from the bar above the product list. The grid view displays the products side-by-side, like a grid.




# 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.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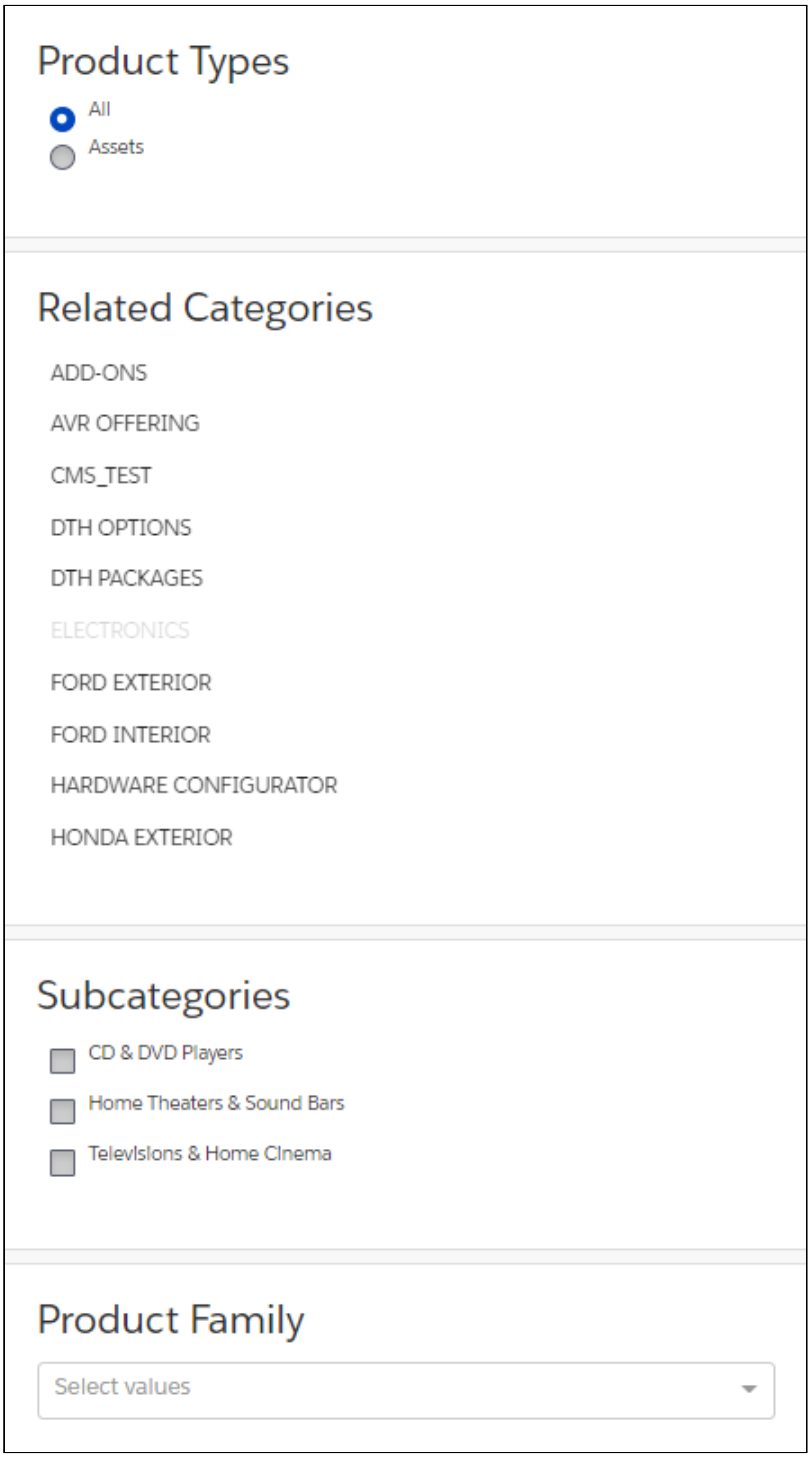


- **Product Type**: You can filter the products according to the type of the product. You can choose from:
    - All: Choosing this option, displays all the products available in the store for purchase.
    - Assets: Choosing this option, displays the products that you have already purchased and that are your assets now.


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- **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 the **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.
    - **Renew**: Renews the Asset.
    - **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.

# Product Carousel

On the Catalog page, all the selected products are displayed in the Product Carousel and you can compare one or more products from the product carousel.

**Troubleshooting**


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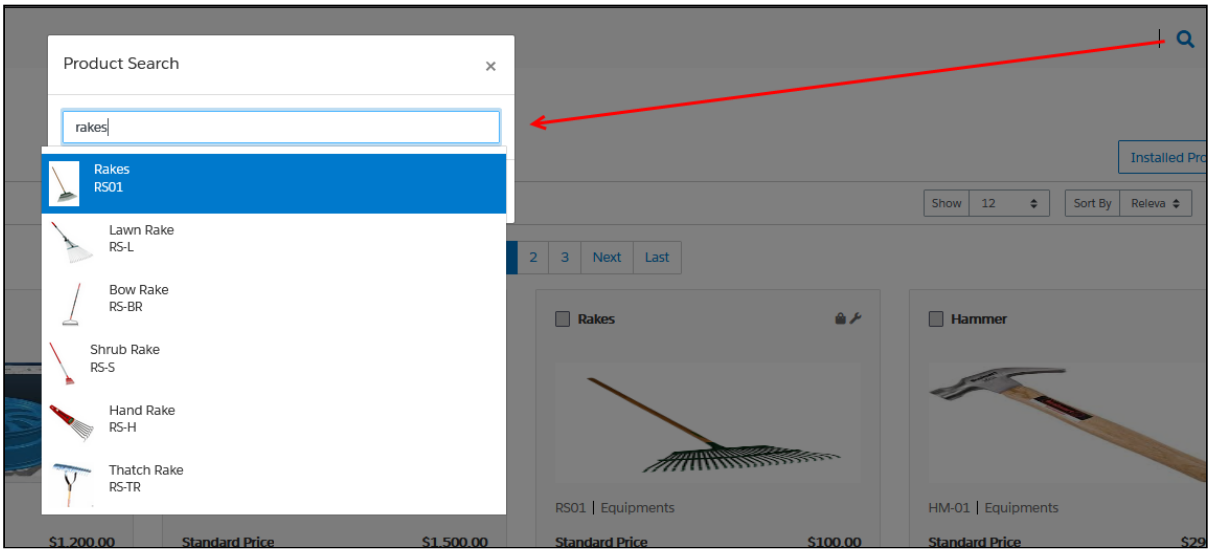
If the catalog page takes a long time to load, try clearing your browser storage.

# Searching for Products

The **Search** icon on the 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 or a whole keyword including space and press Enter on your keyboard. A list of products is displayed matching the entire 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 Details page outlines the product attributes, options, and more. Click on a product name or product image to open the Product Details page. From this page, you can configure your product further with options and attributes.

- You can access the Product Details page from the Catalog, Cart, or Product Recommendation pages.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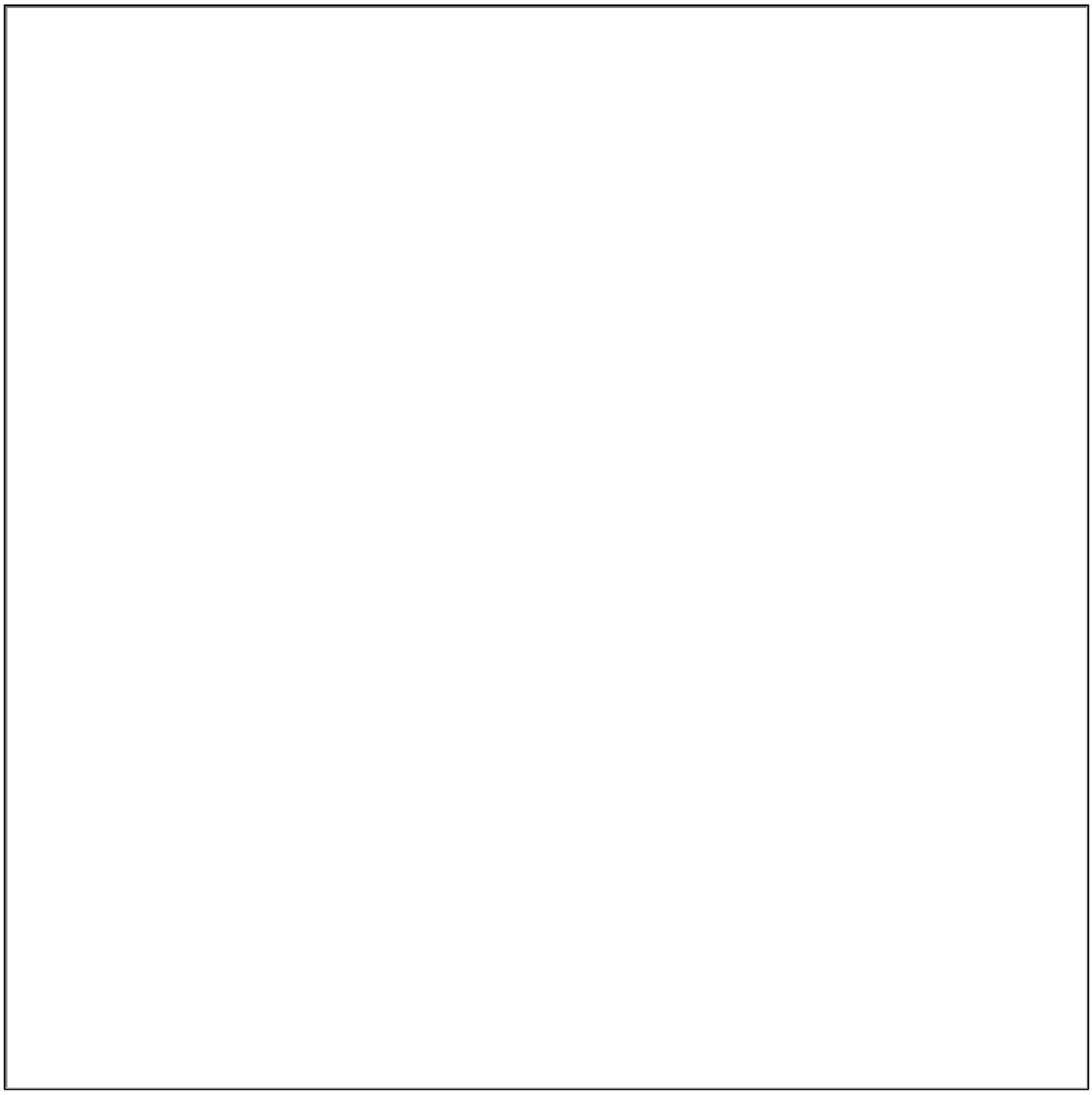
- The details tab provides complete information about the features of the product, product images, attachments, and collateral.



- View and configure complex products with product attributes and options. By default, the Options Group or the Attributes Group sections are displayed in expanded form wherever there is a selection. You can choose to expand or collapse as per your requirement.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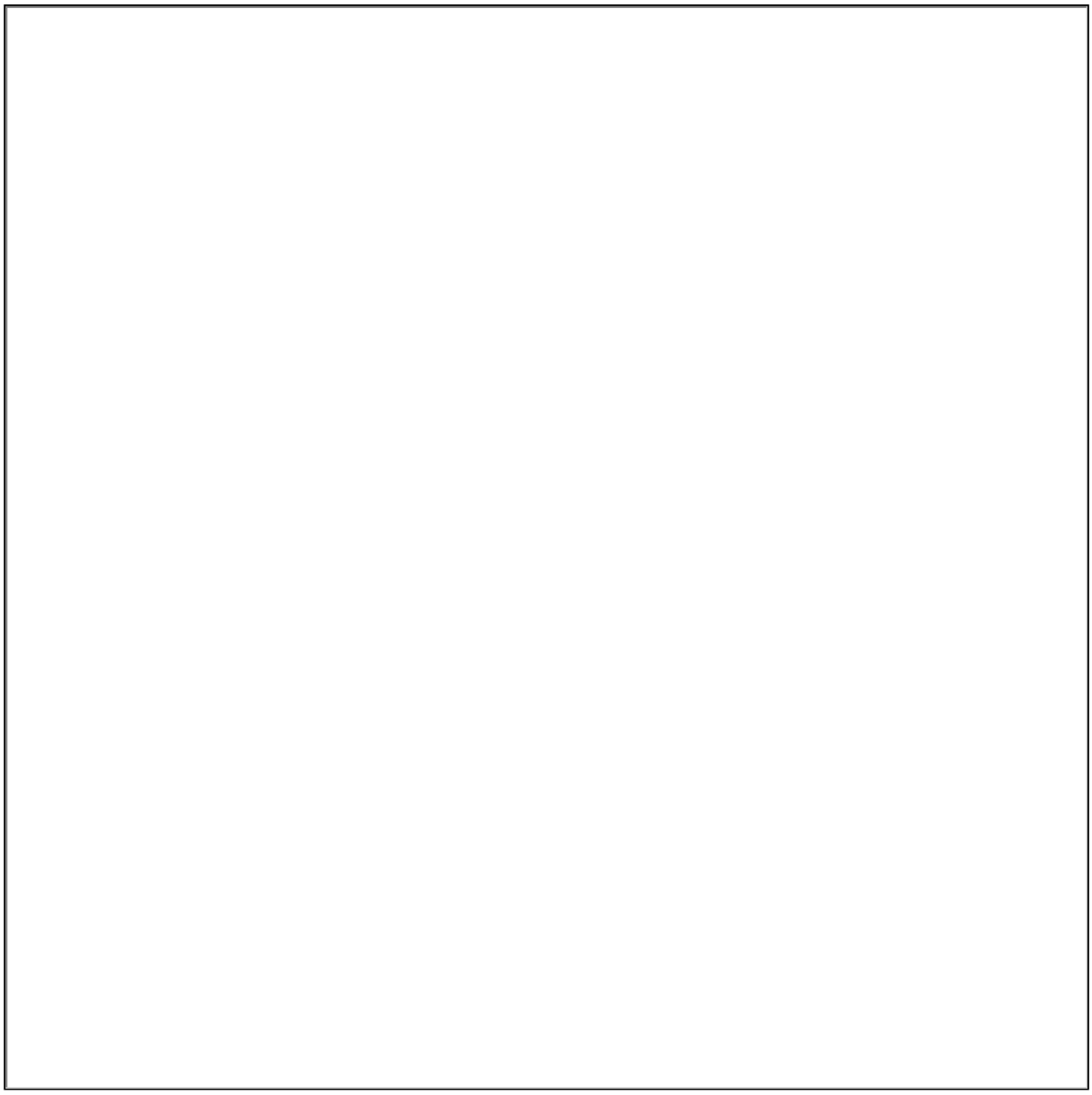


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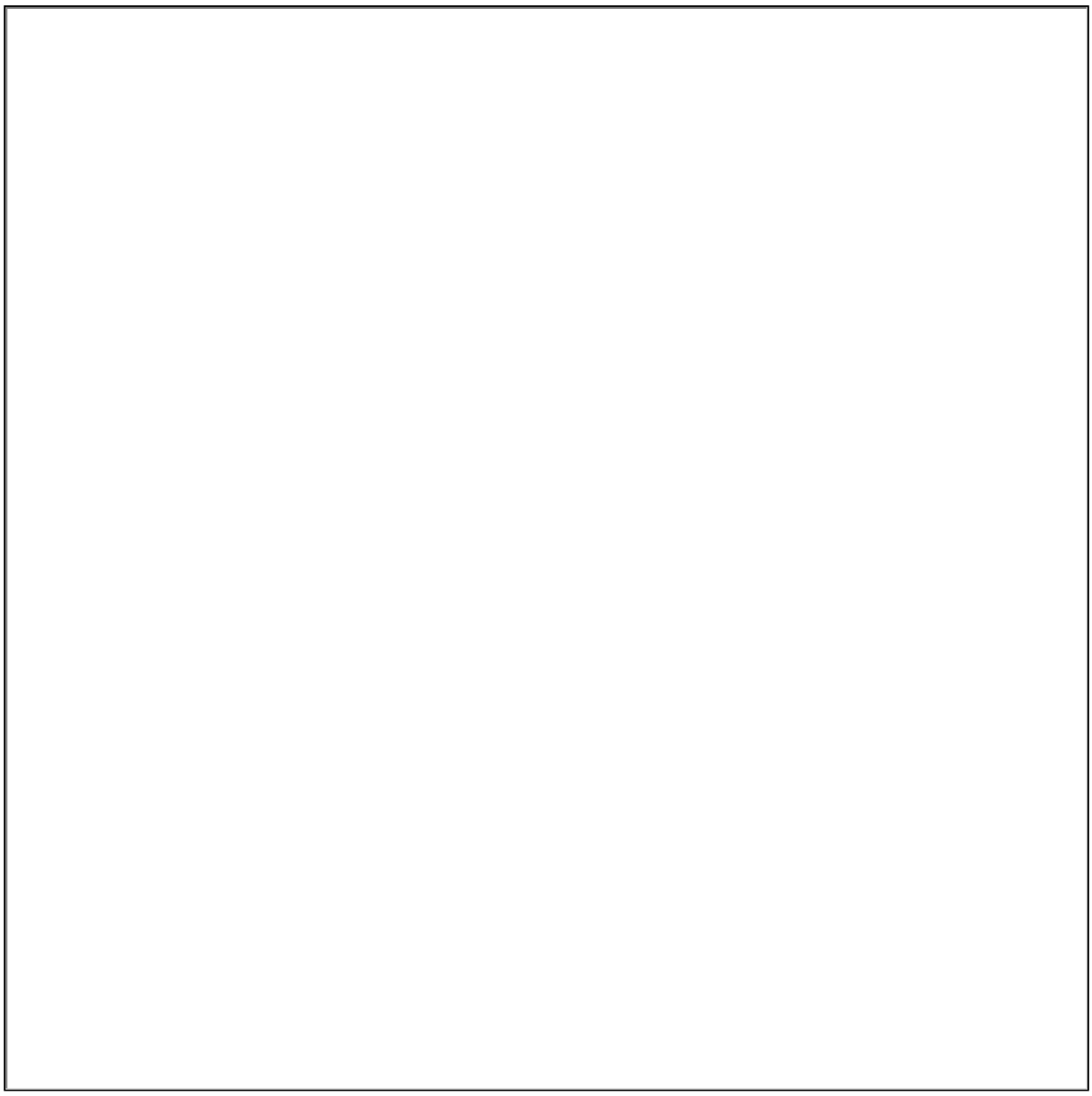
- View Price Summary for Selected Options.



## Viewing the Product Details Page in Embedded Mode

In Embedded mode. the Product Details page outlines the product configuration section in an iframe. Embedded mode is applicable only for complex products.

- You can access the Product Details page from the Catalog or Cart by clicking on the product image.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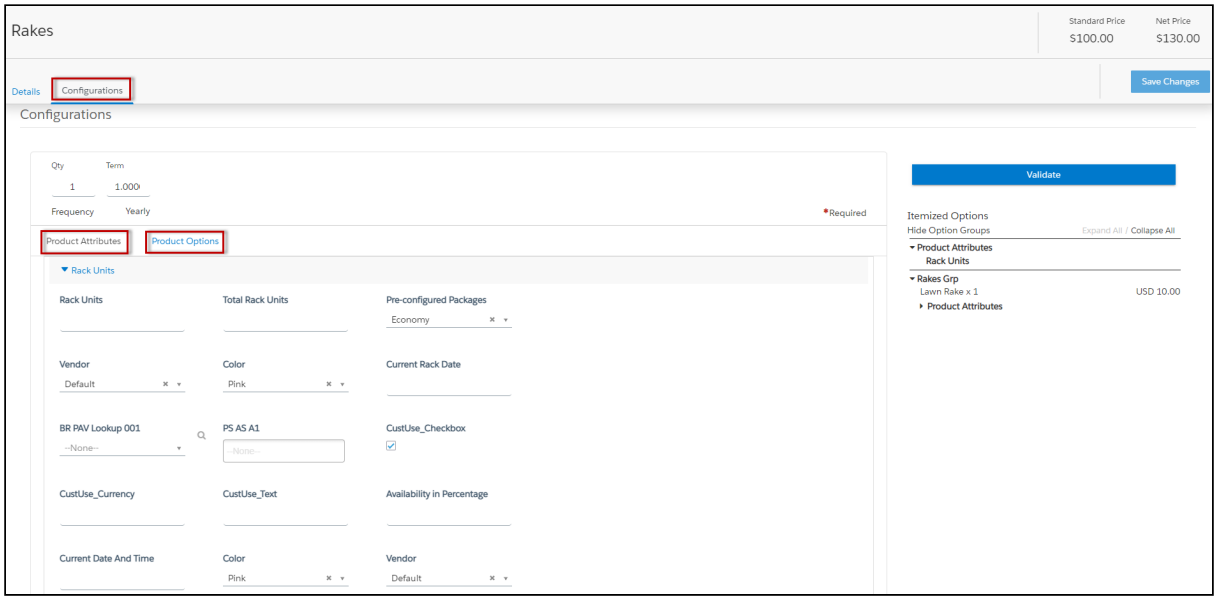
- The details tab displays the Net Price and Standard Price at the top of the details page. The price displayed is for a selected bundle along with secondary charge types.
- The Price Summary button is not available in Embedded mode.
- There is only the Save Changes button available to add the products to the cart.

- View and configure complex products with product attributes and options. Click the Validate button after every change you make to the attributes, options, or quantity.
- Save Changes button in the mini cart is disabled until the user selects a valid configuration for the product.
- Upon navigating away from the product details page having unsaved changes in the cart, a confirmation popup is displayed - "You have unsaved changes to the product configuration! Are you sure you want to proceed?" If you agree, click Confirm or click Cancel to cancel the action.




**Error Components (Notification icon, Side panel, Top error panel, validation panel)**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- All cart errors and errors generated due to the currently selected configuration of the product are displayed.
- Any resolutions done in error components in all other pages except Product details page gets committed to the main cart.
- Any resolutions done in error components in the product details page gets committed ONLY to the secondary cart.
- Any resolutions done in validation error components in all other pages except the Product details page gets committed to both main and secondary carts.
- Cart level resolutions from the error components immediately sync upwards into the MAIN cart.

> **Important**
>
> Asset Based Ordering (ABO) is not supported in Embedded mode.

You cannot add a product to the cart from the Recommended product section in Embedded mode. The only way to add a product to the cart is to click the product card that takes you to the product details page of the selected product.

For information on cart behavior in Embedded mode upon selection and updating product configuration, refer to Working with the Mini Cart.

# 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.**


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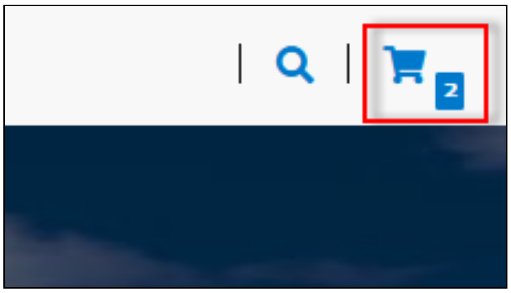


# Product Configuration

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 - available at the option group level only
- 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


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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 the 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.


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- 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 the 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 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.

### 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


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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.


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### 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 users 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 work at all levels of option groups. Also, the minimum and maximum product quantity validation now work for level 1 of option groups. The product details page and the Cart details page also show validation errors for


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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.

**Validate Changes**

While in Embedded mode, if you change attribute or quantity or prompt action from constraint rules on the product details page, you must click the **Validate** button for the changes to take effect.

# 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:


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- 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


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# Supported Features in Digital Commerce With TurboPricing Integration

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

⚠ Other TurboPricing features may work but they are not certified yet.

| Feature | | Sub-Feature | Available |
|---|---|---|---|
| **Price Calculation** | Bundle Pricing | Price included in bundle set at PLI | Yes |
| | | Price included in bundle set at Bundle | Yes |
| | | Price Adjustments at Bundle | Yes |
| | | Base Price Adjustment | Yes, limited |
| | | Base Price Override | Yes, limited |
| | | Rollup method Flat at Bundle level | No |
| | | Rollup method Per Unit at Bundle level | No |
| | | Auto sequencing of options | No |
| | | Contract pricing when the same option exists in multiple bundles | No |
| | Defaulting Quantity | Defaulting quantity for Bundles/Multiple Charges | Yes |
| | | Defaulting quantity FROM Product Attribute | No |
| | | Default quantity derived FROM Advanced Formula | No |


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| Feature | | Sub-Feature | Available |
|---|---|---|---|
| | Defaulting Term | Defaulting term for Bundles/Multiple Charges | No |
| | Selling Term | Selling Term<br>**Use Case**<br>When using Selling term, Start Date, and End Date:<br>• If you want the selling term to be calculated based on the End Date, the Selling Term must be explicitly set to Null.<br>• 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. | Yes |
| | Based on Price List | Based on Adjustment Type: % Discount | Yes |
| | | Based on Adjustment Type: Discount Amount | Yes |
| | | Based on Adjustment Type: % Markup | Yes |
| | | Based on Adjustment Type: Markup Amount | Yes |
| | | Based on Adjustment Type: Price Factor | Yes |
| **Price List Item** | Price Method | Use of Tiered Rates | No |
| | | Use of Per Unit Price method | Yes |
| | | Use of Flat price Price method | Yes |


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| Feature | | Sub-Feature | Available |
|---|---|---|---|
| | Frequency | Use of Daily Frequency | No |
| | | Use of Weekly Frequency | No |
| | | Use of Frequencies Monthly, Quarterly, Half Yearly, Yearly | Yes |
| | | Use of any Custom Frequency | No |
| | Price Type | Use of Price Type - Included Usage | Yes |
| | | Use of Price Type - One Time | Yes |
| | | Use of Price Type - Per unit | Yes |
| | | Use of Price Type - Usage | Yes |
| | | Use of Price Type - Recurring | Yes |
| | LineItem Update | Read-only quantity | No |
| | | Read-only Selling term | No |
| | Setting | Price List Item Setting | Yes, limited |
| **Price Methods** | Proration | Allow Proration set on PLI<br>⚠ This works when the **Selling Term = Null** on the line item. | Yes, limited |
| | Price Method Per Unit | Use of Price Method Per Unit | Yes |
| | Price Method Flat Price | Use of Price Method Flat price | Yes |
| **Pricing Methods** | Min/Max Price | Min/Max Price applies to BasePrice | No |


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| Feature | | Sub-Feature | Available |
|---|---|---|---|
| | | Min/Max Price applies to BaseExtendedPrice | No |
| | | Min/Max Price applies to ExtendedPrice | No |
| | Price Ramps | Use of Price Ramps | No |
| | | Use of Auto Ramp creation | No |
| | | Use of Price ramp overlap | No |
| | | Use of Price Escalators | No |
| | Defer Pricing | Defer Pricing | Yes |
| **Cost Models** | Cost Models | Cost Models | No |
| **Conversions** | Currency Conversion | Use of Multi-Currencies | No |
| | | Use of Dated Exchange Rates | No |
| | | Disable Currency Conversion Rate for a Price List | No |
| | | Currency conversion enabled at a rule see level | No |
| | UOM Conversion | Use of UOM Conversions | No |
| | | Use of Product specific conversion rates | No |
| | | Use of Product Family-specific conversion rates | No |
| **Price Method** | Price Method | Use of Price Method Percentage | No |


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| Feature | | Sub-Feature | Available |
|---|---|---|---|
| **Related Pricing** | Related Pricing | Use of Related Price Lists in Pricing | Yes |
| | | Source PLI set on Related Price List Item | Yes |
| | | Source product and charge typeset on Related Price List Item | Yes |
| | | Source product group and charge typeset on Related Price List Item | No |
| | | Source product family and charge typeset on Related Price List Item | No |
| | | Source Custom Group and charge typeset on Related Price List Item | No |
| | Adjustments in Related Pricing | Adjustment defined on PLI | No |
| | | Adjustment defined on Related Price List Item | No |
| **Price Rule Set** | Header Scope and Criteria | Use of Effectivity period and Active flag | No |
| | | Use of Scope Fields - price list, charge type, product family, product category | Yes (Except Product Category) |
| | | Use of Advanced Criteria | No |
| | | Use of Advanced Criteria with Line Item Reference Fields | No |
| | | Use of Wildcards in Advanced Criteria | No |
| | | Application Level Bundle or Line Item | Yes |
| | | Application Level Aggregate | No |
| | | Use of StopProcessingMoreRules flag | No |


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| Feature | | Sub-Feature | Available |
|---|---|---|---|
| | Dimension based Price Rules | Use of StopProcessingMoreRules flag | No |
| | | Use of Adjustment applies to - Base Price | Yes |
| | | Use of Adjustment applies to - Base Extended Price | Yes |
| | | Use of Adjustment applies to - Extended Price | Yes |
| | Criteria based Price Rules | Use of StopProcessingMoreRules flag | No |
| | | Use of Adjustment applies to - Base Price | Yes |
| | | Use of Adjustment applies to - Base Extended Price | Yes |
| | | Use of Adjustment applies to - Extended Price | Yes |
| | | Match in Product Group | No |
| | | Match in Asset | No |
| | Constraint Rule | Auto Include rules | Yes |
| | | Replacement rules | No |
| | | Recommendation rules | Yes |
| | Multiple Criteria | Multiple Rule Entry Criteria | Yes |
| | Price Matrix | Price Matrix | Yes |
| | | Condition/Dimension | Yes, limited |
| | Price Rule Entry | Effective Dates | Yes |


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| Feature | | Sub-Feature | Available |
|---|---|---|---|
| **Price Dimension** | Use of Un-supported Price Dimension Types | Use of Un-supported Price Dimension Types - any type Except Line Item, Product Attribute, and Formula Field | No |
| | Use of Custom Price Dimension Types | Use of Custom Price Dimension Types | No |
| | Service CPQ | Service CPQ | No |
| **Adjustments** | Manual Adjustments | Line level adjustments | No |
| | | Bundle Effective Adjustments (Group Adjustment) | Yes, limited |
| | | Group adjustment spread | No |
| | | Line-level adjustment of usage price tiers | No |
| | | Usage Tier Modifiable | No |
| | | Misc Charge Types | No |
| | | Conditional Charge Type | Yes |
| | Adjustments | Adjustment Bucketing | No |
| | | Ability to create multiple Adjustments | No |
| | | Auto-refresh Usage price tiers | No |
| | | Bundle only adjustments | Yes |
| | Bundle/Option level manual Adjustments | Line-level adjustments | No |
| | Bundle/Option level Adjustments | Group adjustments | No |


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| Feature | | Sub-Feature | Available |
|---|---|---|---|
| **Asset-Based Pricing** | Assets | Assets | Yes |
| **Incentives** | Other application types except for Promotion | Use of Price Program, Loyalty, Rebate, Milestone Incentive or Custom | No |
| | Promotions applied on Line Item and Summary Group | Promotions applied on Line Item and Summary Group | Yes (Except Summary Group) |
| | Promotions applied on other items | Promotions applied on other items except for Line Item and Summary Group | No |
| | Promotion | Single Rate Type Promotion | Yes |
| | | Apply Coupon | No |
| | | Multiple Promotions | Yes |
| | Support for Promotion type - Buy X Get X and Buy X Get Y | Promotion with Product Scope as Include (AND) | Yes |
| | | Single Rate Type Promotion | Yes |
| | | Single Rate Type Promotion with Coupon | Yes |
| | | Single Rate Type Promotion with Different Adjustments Applies to values | Yes |
| | | Single Rate Type Promotion with Criteria | Yes |


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| Feature | | Sub-Feature | Available |
|---|---|---|---|
| | Support for other Promotion types - except Own every X Get Y, Support for Promotion types - except Own every X Get Y | Support for other Promotion types - except Own every X Get Y | No |
| | Incentive Limits | Support for Promotion Limits | No |
| | Incentive Coupons | Support for Coupon Limits | No |
| | Sales Promotions | Sales Promotions | No |
| | Advanced Criteria set in Price Ruleset | Support for Incentive Criteria on Price Ruleset | No |
| | Advanced Criteria with Reference Fields on Price Ruleset | Advanced Criteria with Reference Fields on Price Ruleset | No |
| **Quotes** | Quote collaboration | Quote collaboration | No |
| **Carts** | Favorite Configurations | Use of Favorite Configurations | No |
| | Smart Carts | Use of Smart Carts | No |
| | Submit for Approval | Submit for Approval | No |
| | Copy | Copy products | Yes, limited with only API support. |
| **Cart Line Item** | Revalidate | Revalidate<br>For more information, see Revalidating the Product Configuration in Digital Commerce. | Yes |


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| Feature | | Sub-Feature | Available |
|---|---|---|---|
| **Totaling and Summary Groups** | Adhoc Totaling | Adhoc Totaling | No |
| **Deal Guidance** | Deal Guidance | Deal Guidance | No |
| **Callbacks** | Callbacks | Pricing Callback | No |
| | | Validation Callback | No |
| | | Cart Approval Callback | No |
| | | Advanced Approval Callback | No |
| | | Loyalty Cycle Callback | No |
| | | Bulk Loyalty Point Callback Class | No |
| | | Adjustment Spread Callback | No |
| | | Loyalty Point Callback | No |
| | | Related Pricing Callback | No |
| | | Pricing Extension Callback | No |
| **User Experience** | Bundle-specific option line item update | Read-only quantity | No |
| | | Read-only selling term | No |
| | LineItem Update | Line level adjustments | No |
| | | Group adjustments | No |
| | Turbo Pricing | Pricing Fallback | Yes |
| | | Pricing Failure (Retry mechanism) | Yes |


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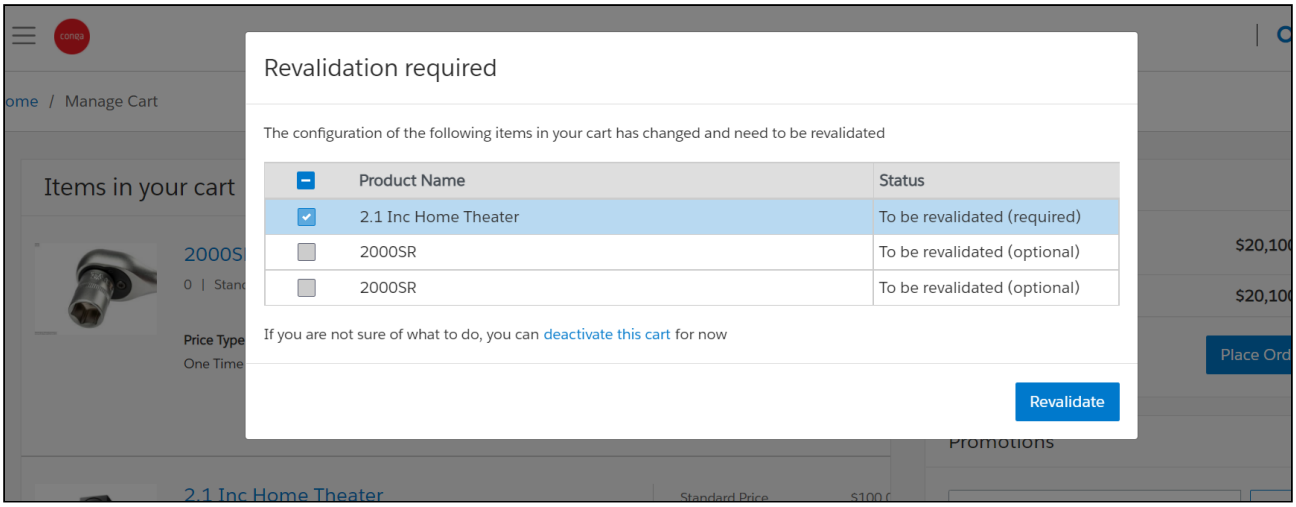
# Revalidating the Product Configuration in Digital Commerce

You can re-validate your saved quote for the product structure changes. Saved quotes created in the past might have a product for which structure or rule has been changed. This can affect the validity of such a quote when you re-open the configuration. Re-validation includes changes to the product structure, such as the addition or deletion of options.

## To enable re-validation of the cart

1. Click **All tabs** and click **Storefronts**.
2. Select your Storefront from the available list.
3. Select the Enable Cart Revalidation check box.
4. Click **Save**.

Now, whenever an Admin changes the Product Configuration and updates the Version field of the product, you see the **Revalidate** button on the previously saved Cart page.




**Use Case 1: Data sync not done**

1. Add product A to cart with Product Version as 8.
2. Change the product version from 8 to 9 (hard revalidation)
3. Do not perform Data Sync.
4. Refresh the application, switch the cart, edit the quote or order.
5. You see the Revalidate button. The GET API is triggered for the lineitem at cart level and product on the Salesforce. A popup is displayed and you are blocked to progress further.
6. Click the Revalidate button. The POST API is triggered displaying the lineitem as product version 9.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7. Create a New cart and add product A. Notice that the Product is displayed with product version as 8. This is because data sync was not performed with Lightsaber.

**Use Case 2: Data sync done**

1. Add product A to cart with Product Version as 8.
2. Change the product version from 8 to 9 (hard revalidation)
3. Perform Data Sync.
4. Refresh the application, switch the cart, edit the quote or order.
5. You see the Revalidate button. The GET API is triggered for the lineitem at cart level and product on the Salesforce. A popup is displayed and you are blocked to progress further.
6. Click the Revalidate button. The POST API is triggered displaying the lineitem as product version 9.
7. Create a New cart and add product A. Notice that the Product is displayed with product version as 9. This is because data sync was performed with Lightsaber.

**IMPORTANT**

Hard Revalidation is considered, when a product version is changed incrementally with a higher digit. For example, from 0 to 1, 0 to 2, 1.4 to 2.6.
Soft Revalidation is an incremental or decremental change in the version number. Consider the following:

- If a Pricelist is deactivated, expired, or deleted
- Any pricing changes without product version change
- A product version change from 0 to 0.1 or 2 to 1

# Managing the Cart

You can see the cart details after logging into the application. 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


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- 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 > select the **Is Active** option to make that cart as a primary cart. The active cart is highlighted with a green color. Changing the active cart with a different pricelist displays the categories and products of the selected pricelist on cart in real-time.
- **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 per page.


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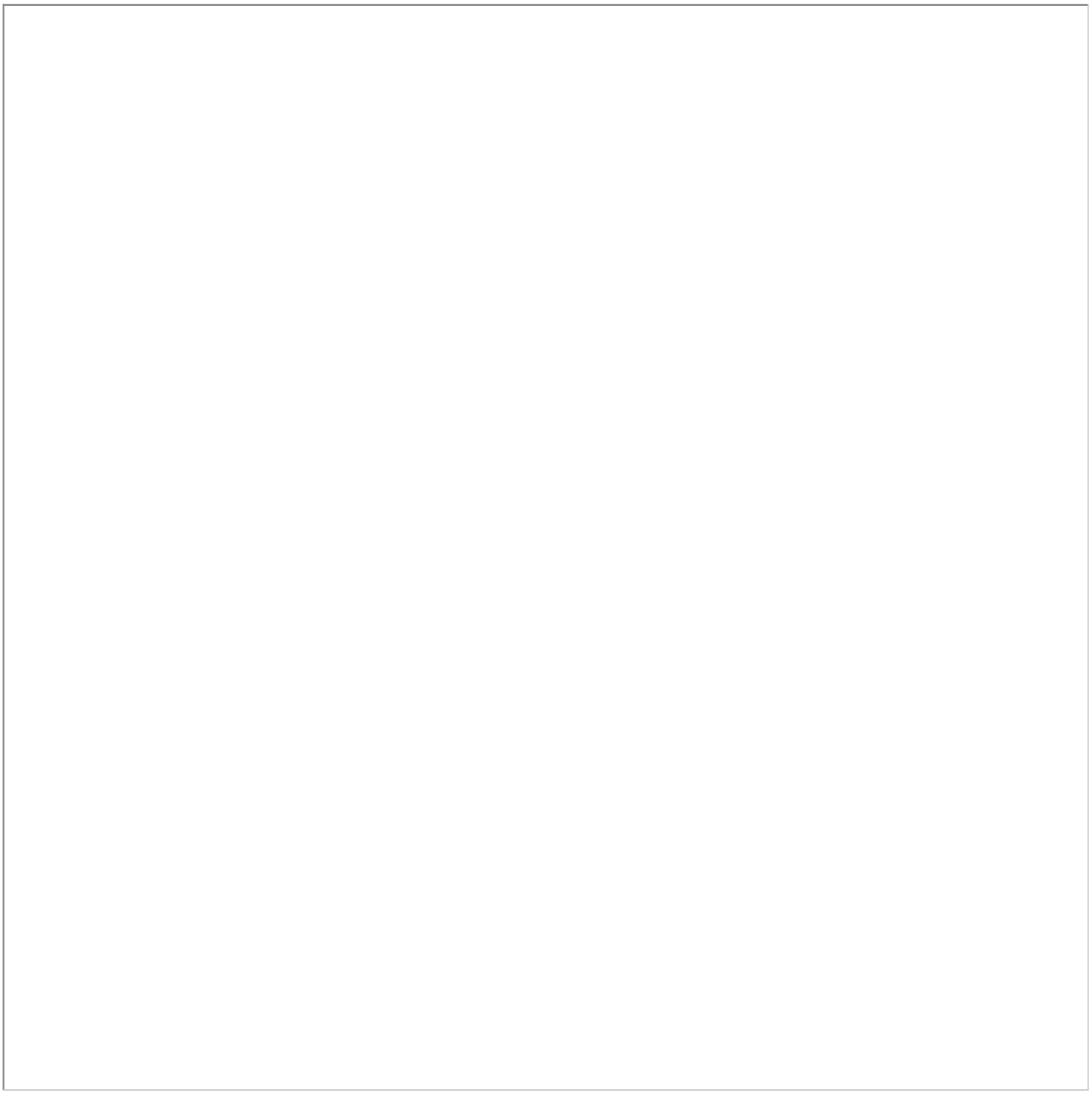

# Performing Asset Based Ordering actions for Installed Products on the Cart page

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


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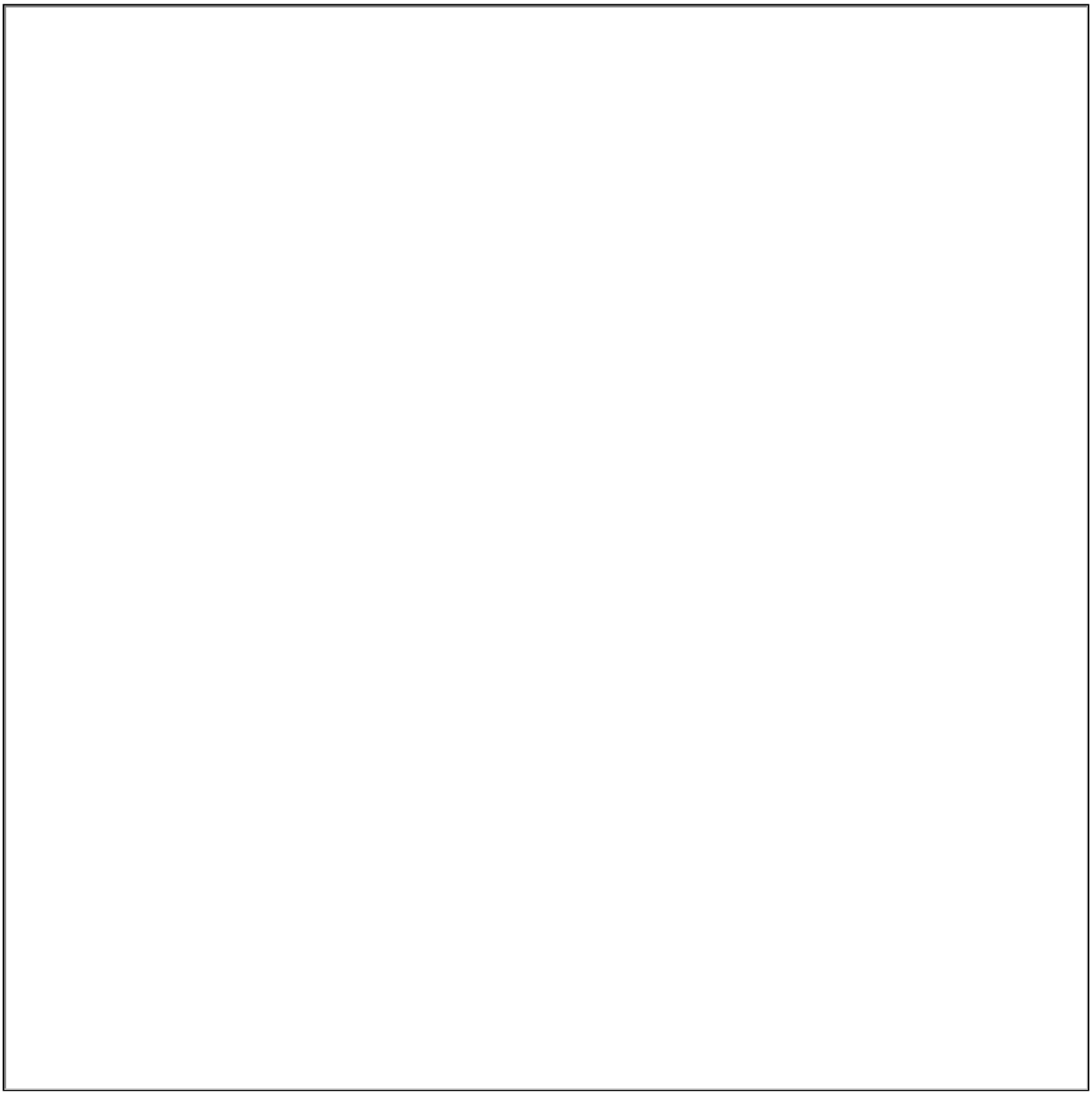
⚠ You cannot perform Asset Based Ordering (ABO) actions on Onetime products. By default, ABO actions are disabled for Onetime Products. You can perform only Buy More action for the Onetime products.

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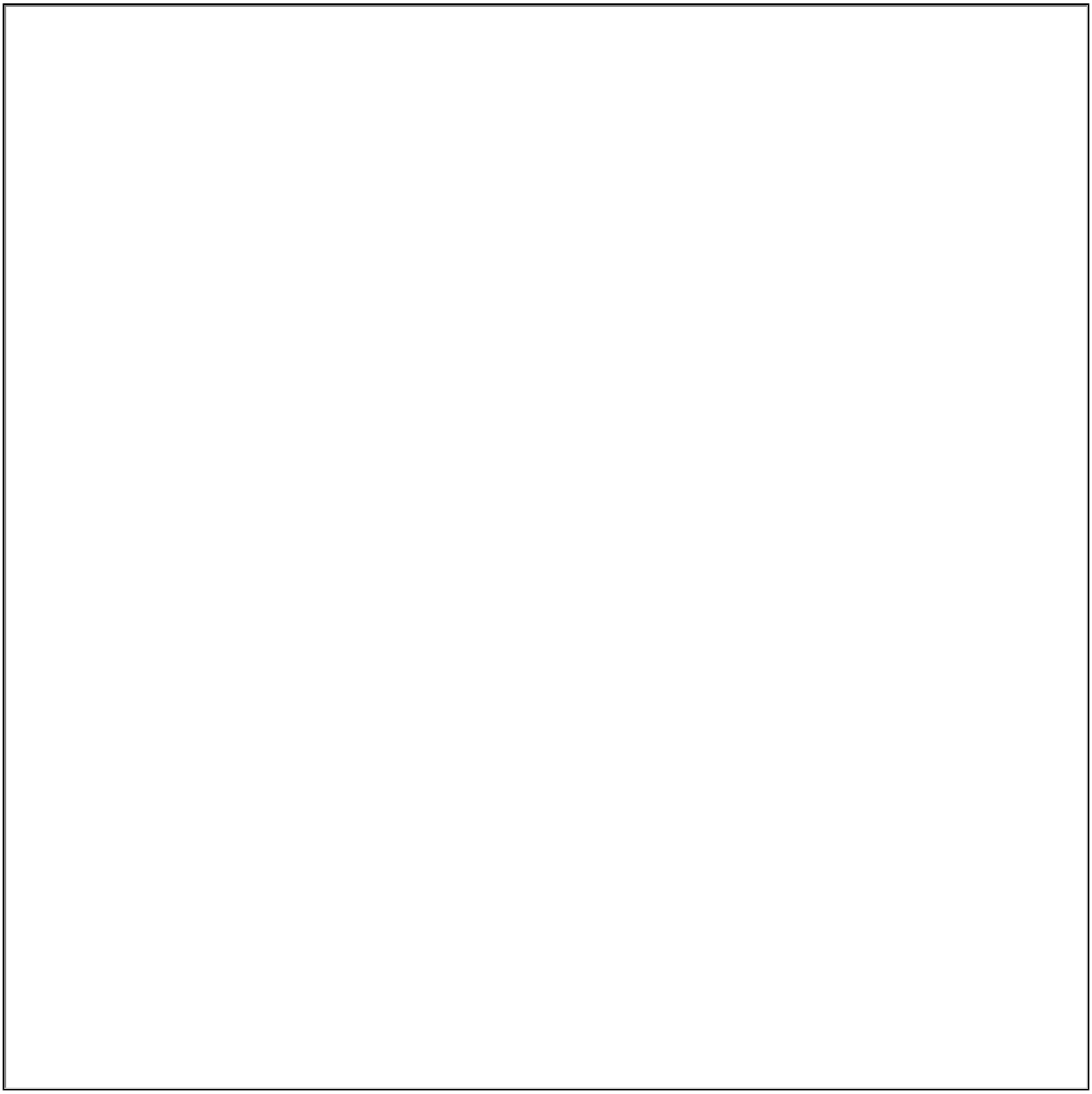
- Change quantities
- Change Start Date and End Date for Subscriptions
- Delete Items
- Navigate to the Product Details page
- View product summary/totals
- Update price
- View configuration details



- Request a Quote
- Manage Payments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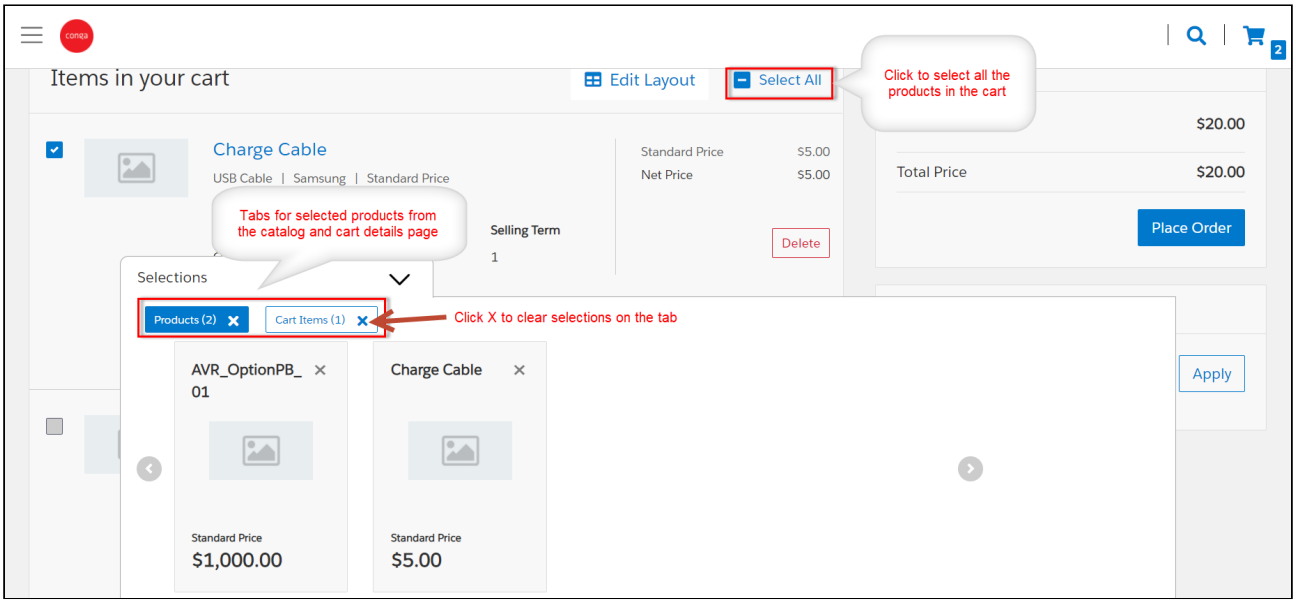
- View tax details
- Change language and view translated data

# Concurrency of Actions

You can perform multiple actions at the same time on the cart with no limits.

# Using the Bulk Action Drawer

The Bulk Action Drawer is persistent across the application that enables you to perform bulk actions with product selection from the catalog, cart line items from the cart details page, and action selection.




The selections from a cart are retained till the cart is active and the line item is not deleted manually. The bulk actions that you can perform are:

- For products
  - Save as Favorite - This feature is not available for guest users. You must log in to use the Save as Favorite feature.
  - Compare - Supports up to 5 products. This action is not available if more than 5 products are selected.
  - Renew - This feature is not available for guest users. You must log in to use Renew.
  - Terminate - This feature is not available for guest users. You must log in to use Terminate.
- For Cart Line Items: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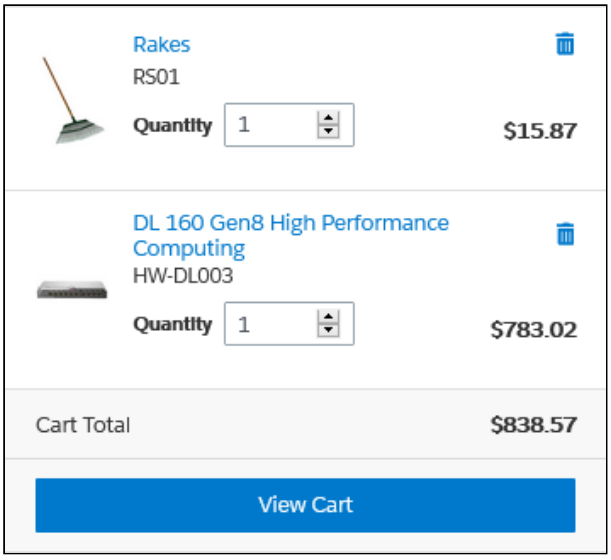
- Clone - Cloning the primary line items.
- Save as Favorite - This feature is not available for guest users. You must log in to use Save as Favorite feature.

# Working with the 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 the cart
- Change quantity
- View the full cart

# Mini Cart in Embedded Mode

When you select a product from the catalog, the product details page appears. The mini cart displayed in Embedded mode is different. With the Embedded mode, there are two carts available, Main Cart and Secondary Cart. The main cart is the primary cart; whereas the secondary cart is the cart that shadows changes in the main cart and also holds the product being configured as a line item. Any changes to the main cart either manual or automatic (based on rules) are synced to the secondary cart immediately.

Except for the product details page, the mini cart displays only the main cart items.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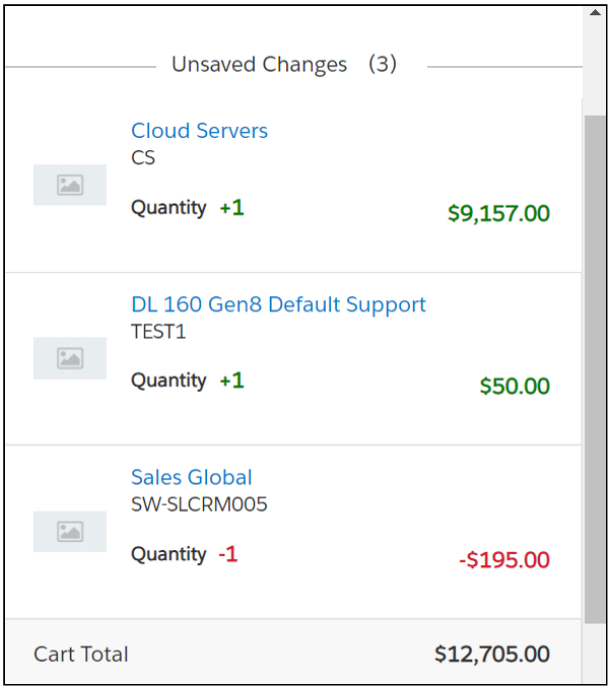
On the product details page, the mini cart in embedded mode displays:

- Every time the product details page is loaded, the secondary cart is re-synced from the main cart.
- Quantity fields are read-only.
- Delete buttons are not available next to the line items
- Main Cart items + Unsaved changes sections are displayed where unsaved changes are the difference between secondary and main cart.
- Line items removed from the main cart are shown in negative quantity.
- The count of changed cart line items is displayed on the Unsaved Changes section header.
- Save Changes button is displayed as long as any unsaved change present. Save changes button is active or disabled depending on the validity of the selected configuration.
- Cart total displays the combined total of the secondary cart (main cart + unsaved changes).
- Save Changes button in the mini cart is disabled until the user selects a valid configuration for the product.




From the embedded mode mini cart, you can:

- View selected products displayed in the Unsaved Changes section (secondary cart).
- View selected products displayed in the main cart upon clicking Save Changes. Standalone products are directly added to the main cart.
- View the full cart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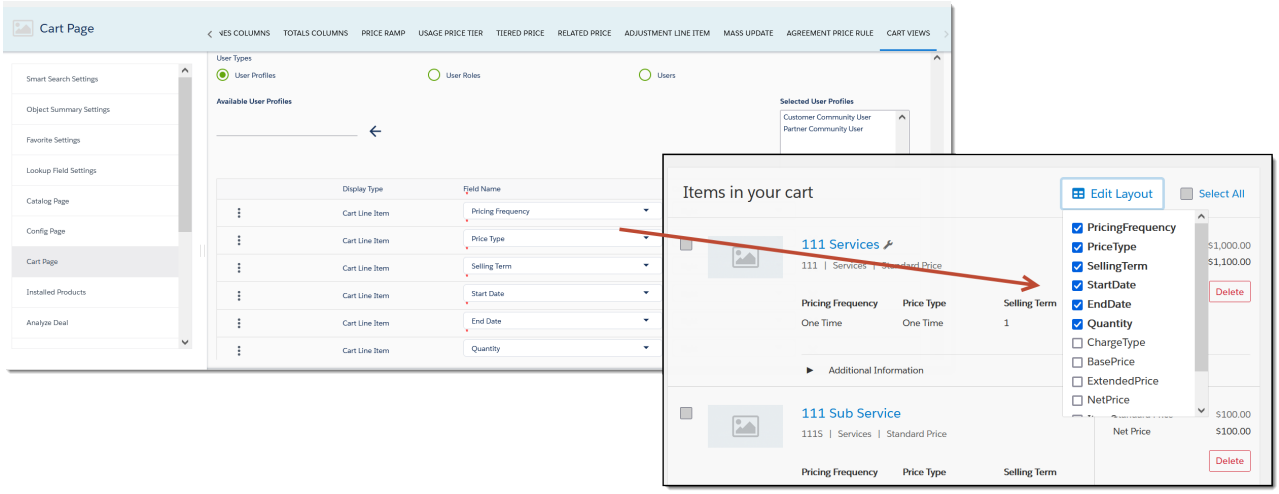
# Configuring Cart Line Item Fields

After your administrator has created cart views in the CPQ Admin Console, as an end user, you can select fields of your choice to be displayed on the cart details page. The Edit Layout action button enables you to configure fields on the cart details page in real-time. Clicking the Edit Layout button lists all the fields made available by your administrator. The list of fields displayed is derived from the fields you selected on the Cart Lines Columns tab in CPQ Admin console. The selected fields are the one's you selected in your user view on the Cart Views tab. The sequence of the fields in the Edit Layout list is derived from the sequence set by your administrator.




You can select the fields that you want to see for line items on the cart details page. These fields are displayed in the line item in the same sequence as selected in the Edit Layout list.

> **Important**
>
> Digital Commerce supports all the fields on the cart page as supported in earlier releases. Pricing Frequency, Price Type, Selling Term, Start Date, End Date, and Quantity out of which only **Start Date**, **End Date**, and **Quantity** can be set as editable.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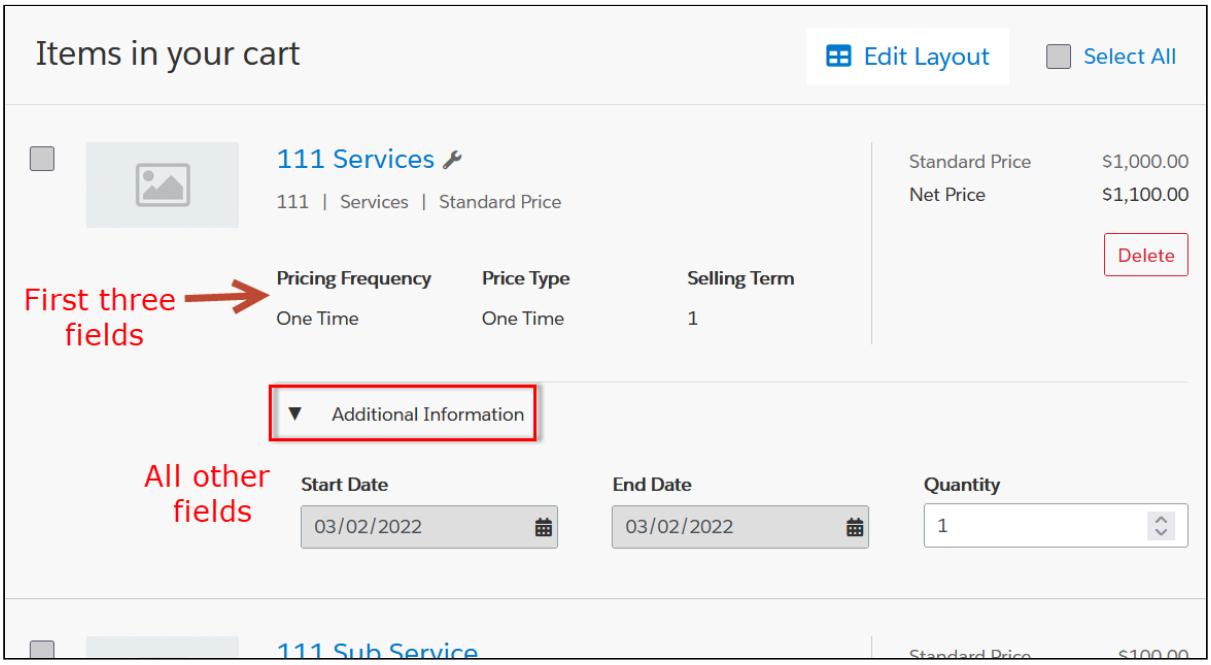
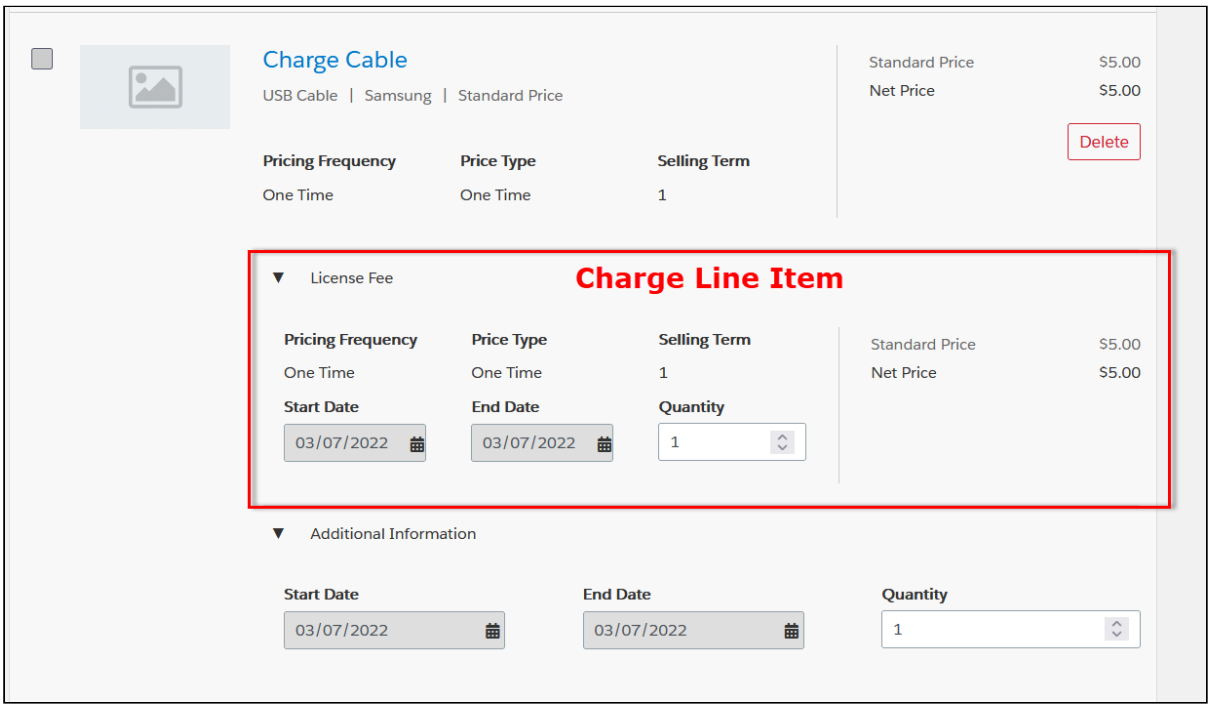



As per design, the first three fields are displayed just below the product information. If there are more than three fields, the remaining fields are displayed under the Additional Information expandable accordion except charge line items. For charge line items all the fields are displayed below the product information.




All the selections are applied to primary line items as well as charge line items. The sequence of the fields change based on the selection in the Edit Layout list. For example, you remove Selling Term, Start Date moves up in sequence. The selected fields apply to all the line items on the cart details page.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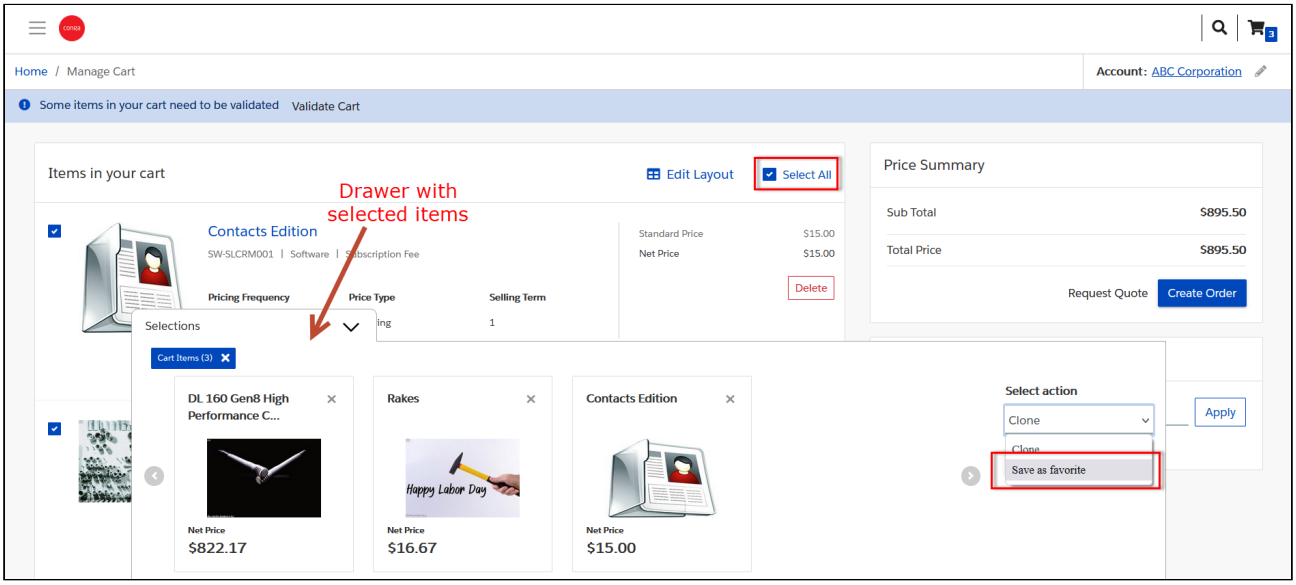
There is no limit to the number of fields that can be displayed. For better performance, up to 50 fields is recommended.

# Saving a Cart Configuration as Favorite

The Save as Favorite feature enables you to save a cart configuration for reuse and is available only for logged in users. The saved configuration can be used multiple times in the same quote or across different quotes. A saved configuration includes all the selected products on the cart with the options and attributes defined within the product. The configuration can be made public for all users or private to the user who saved the configuration. When Save as Favorite feature is enabled in your org, you can mark a cart configuration from the Cart details page and the Catalog. For detailed information on enabling or disabling the Save as Favorite feature, see Configuring Save as Favorite.

### Cart details page




### Catalog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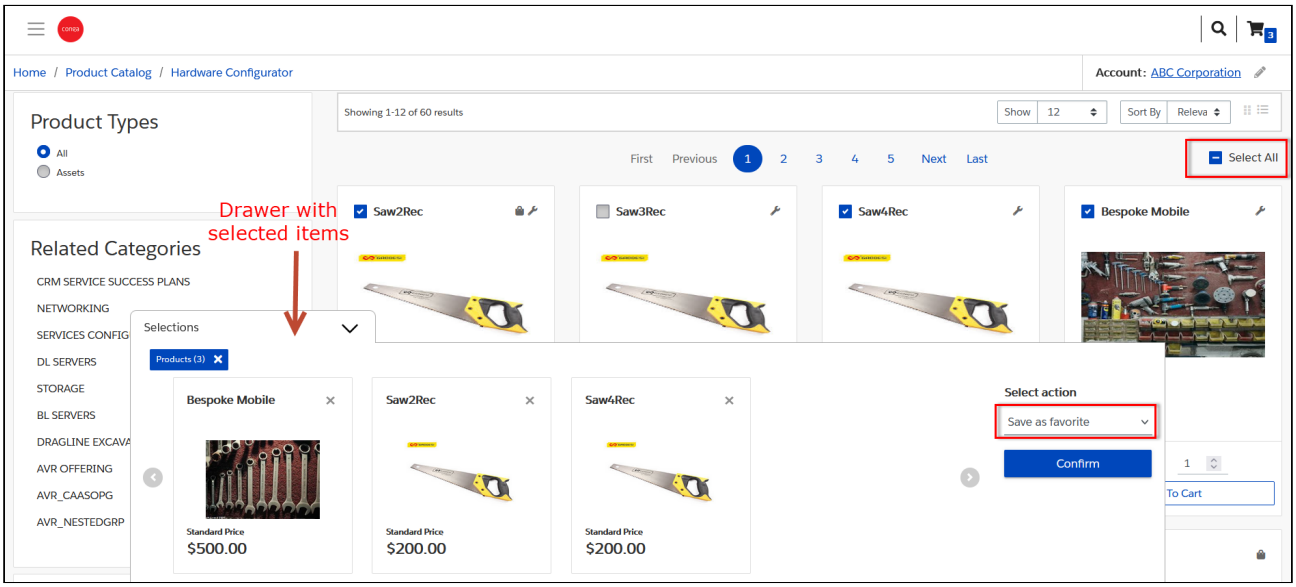


Every line item on the Cart details page and every product card on the Catalog has a checkbox besides it. Selecting the checkbox opens a drawer with a list of selected items. From Selection Action, select Save as favorite and click Confirm to save the selected items along with its configuration. You can also Select all to select and include all the line items in the drawer to save them as a favorite or remove some items and then save the rest of the items as a favorite configuration.

Selecting Save as favorite and clicking Confirm opens a popup that allows you to search and select an existing favorite or add a new favorite. To search and select an existing favorite configuration, click next to the search icon.


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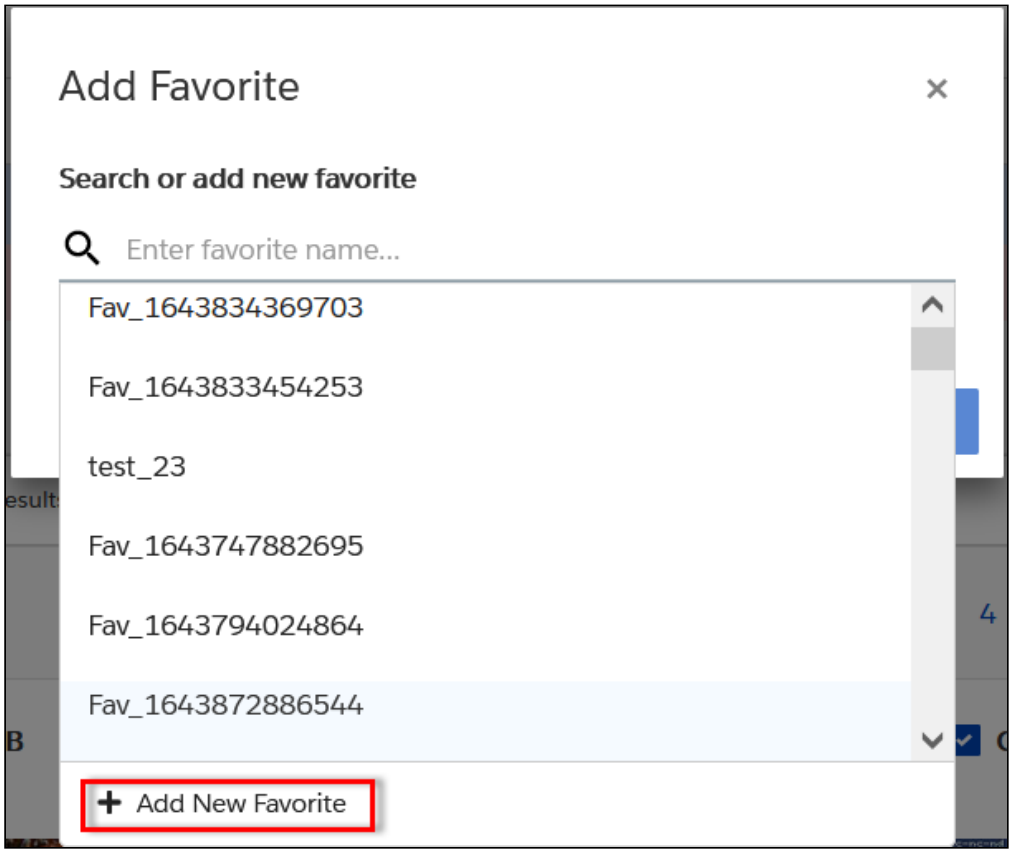
## To add a new favorite

1. Click next to the search icon.




2. Click Add New Favorite.
3. Specify a Name for the favorite.
4. Provide a brief Description.
5. To make the favorite configuration visible to all the users on the account, select Make publicly visible. Do not select this checkbox, if you want to make the favorite configuration visible only to you.
6. Click Add Favorite. A new favorite configuration is added.

Clicking the Add To Existing button takes you back to the search popup, where you can see all the existing favorites (including public ones) that are added by other users in the pricelist.

## Viewing and Using Favorites

You can view and use favorite configurations from My Accounts > Favorites page.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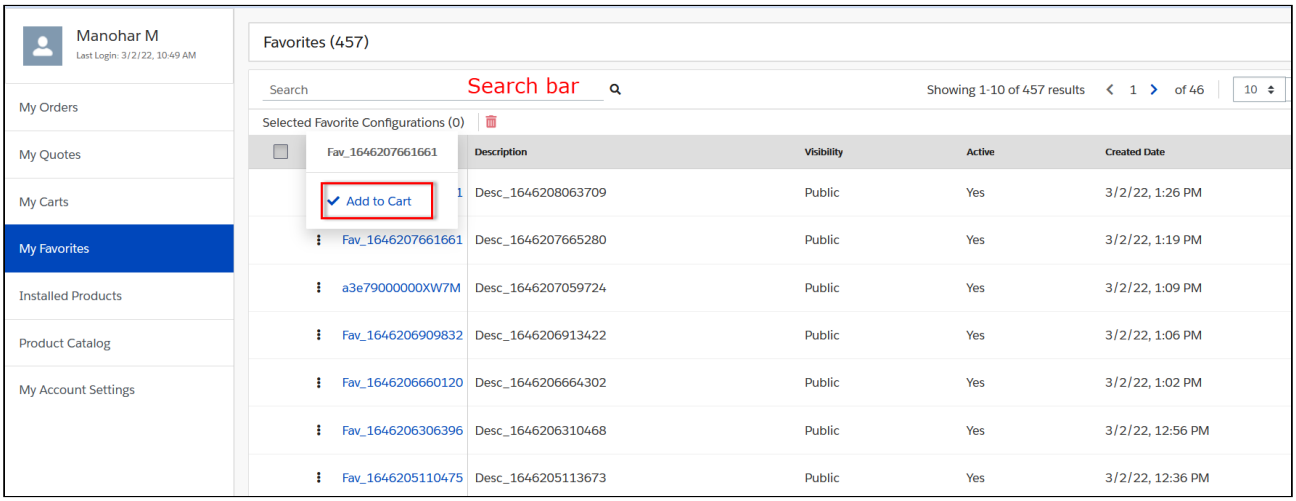
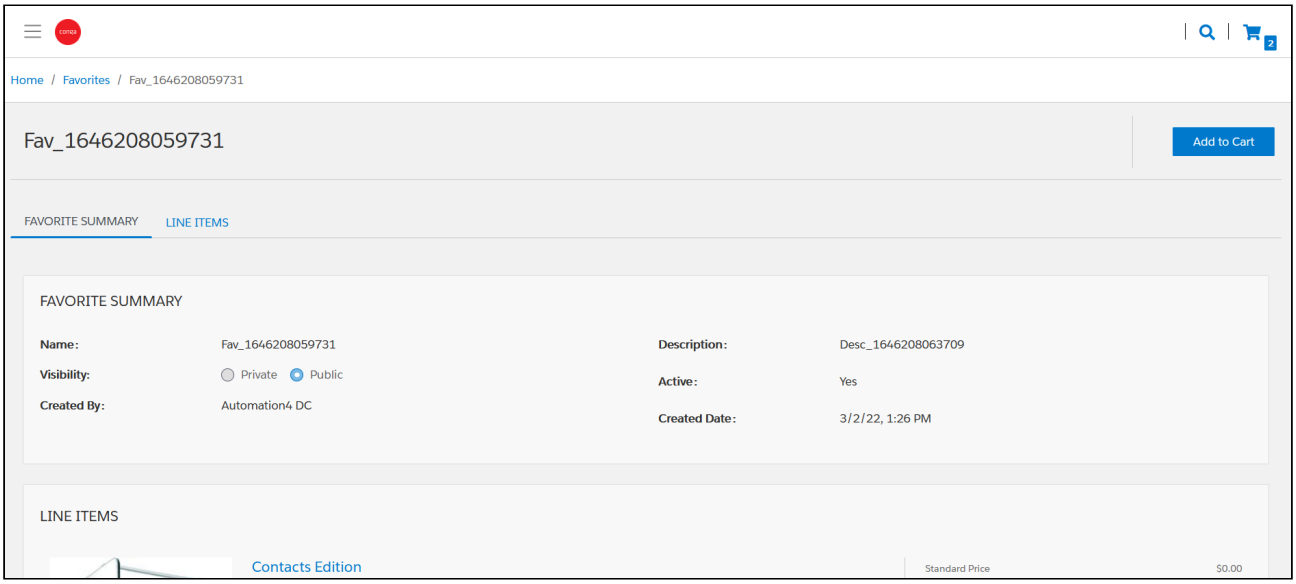



The Favorites page lists all the favorite configurations (public and private) saved on the active pricelist. In case of private favorite configuration, you can view only those private favorites that are part of your own pricelist. You can search a favorite by name from the search bar on the Favorites page. Each row in the favorites list allows you to perform the following actions:

- Add to Cart - Adds all the line items in the configuration to the cart
- Delete - Deletes the favorite configuration. You can delete Favorites created by you only. If you want to delete multiple favorites at a time, you can select multiple favorites and click the Delete icon on the table level.

Click the Favorite name to view the Favorite Details page. You can modify the Name, Description, and Visibility of the Favorite from the Favorite Summary section only if it is an active favorite and owned by you. All the line items in the Favorite are listed in the Line Items section.




Click Add to Cart to add all the items in the favorite to cart.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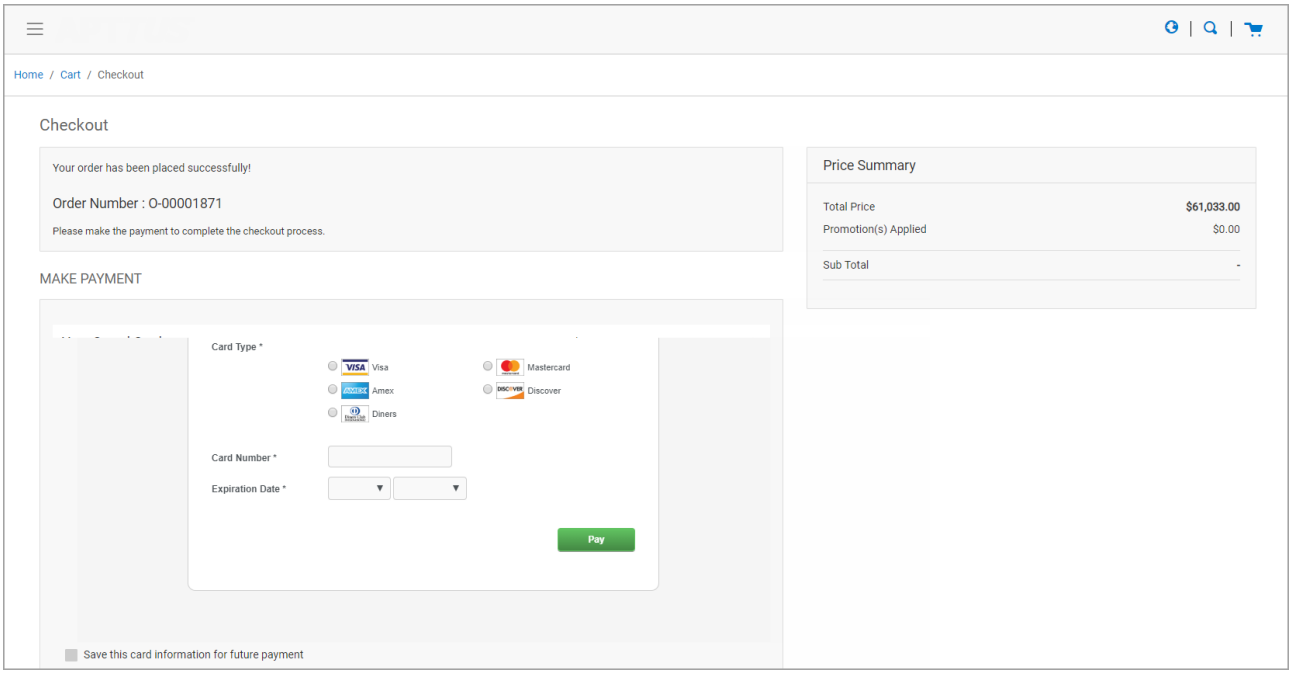
# Managing Payments

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 “Quote/Order” on the Request Quote/ Checkout page or on the Quote/Order Summary.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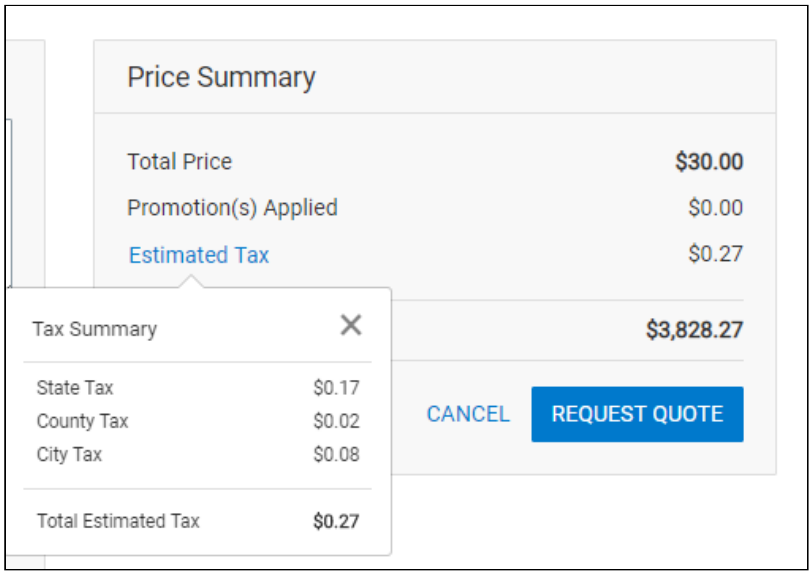
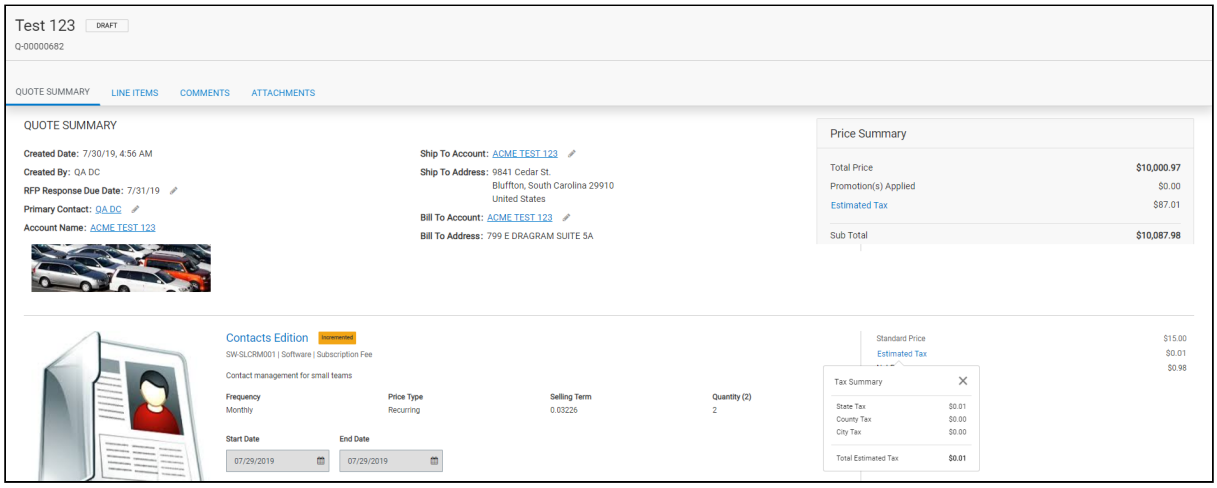



- View Line Item level tax details on View Quote / View Order Page




# 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 language 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)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## 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

# Cloning Primary Line Items

You can add a clone of existing primary line items to the cart. The new cloned line item has the same selected configuration as the source line item. You can then modify the cloned line item as per your requirement. This eliminates the need for you to start configuring a line item from scratch.

Every line item on the Cart details page has a checkbox besides it. Selecting the checkbox opens a drawer with a list of selected items. From Select Action, select Clone and click Confirm to add the selected items along with its configuration to the cart. You can also Select All to select and add all the line items or remove some items then add the rest of the items to the cart. You can later make modifications to the cloned line items.


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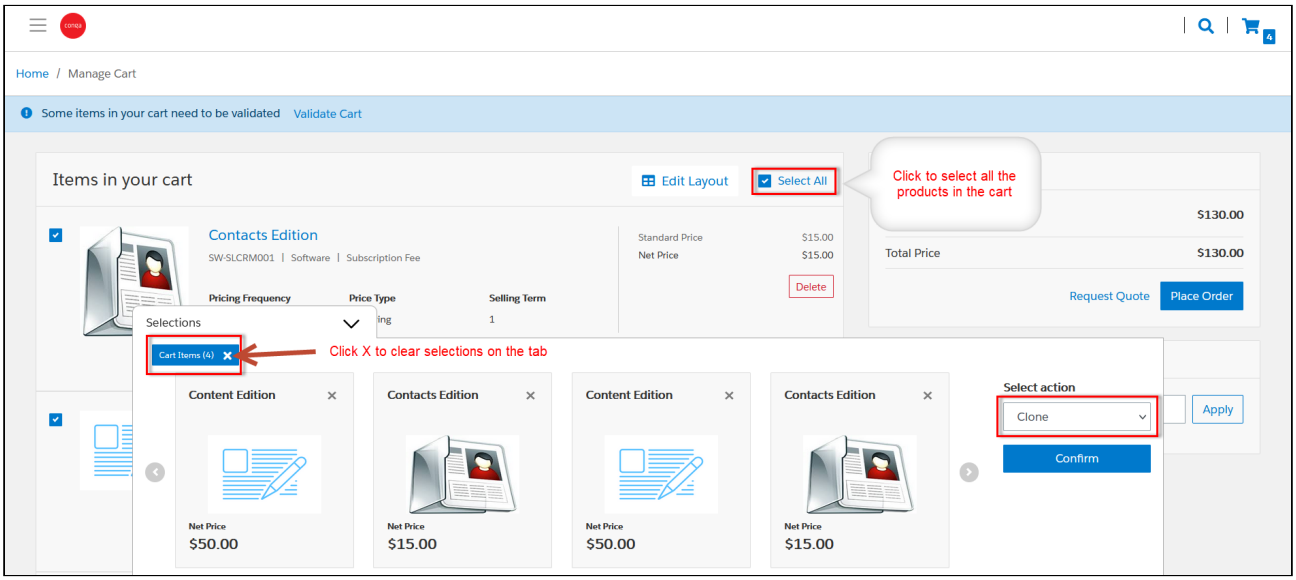


# Creating a Quote

You can create and request a quote for a customer using Digital Commerce before placing an order for better pricing and product configuration.

**Pre-requisite:**

- Ensure that **Enable Request Quote** flag is set to *True* by your administrator on the Storefront record.

After requesting a quote, you can perform the following:

- Present the quote with the requested products, services, and pricing.
- View and track quotes.
- Modify the quote by editing the header and line items in a requested quote. You can add, change, or delete items from the requested quote in Draft stage only.
- View and manage details of a requested quote created by the customer or created for the customer.
- Accept the quote on behalf of the customer after receiving confirmation from the customer.

## Requesting a Quote

As a logged in user, you can add products and request a quote by clicking the **Request Quote** button on the cart page.

> ⚠ You cannot request a quote as a guest user.


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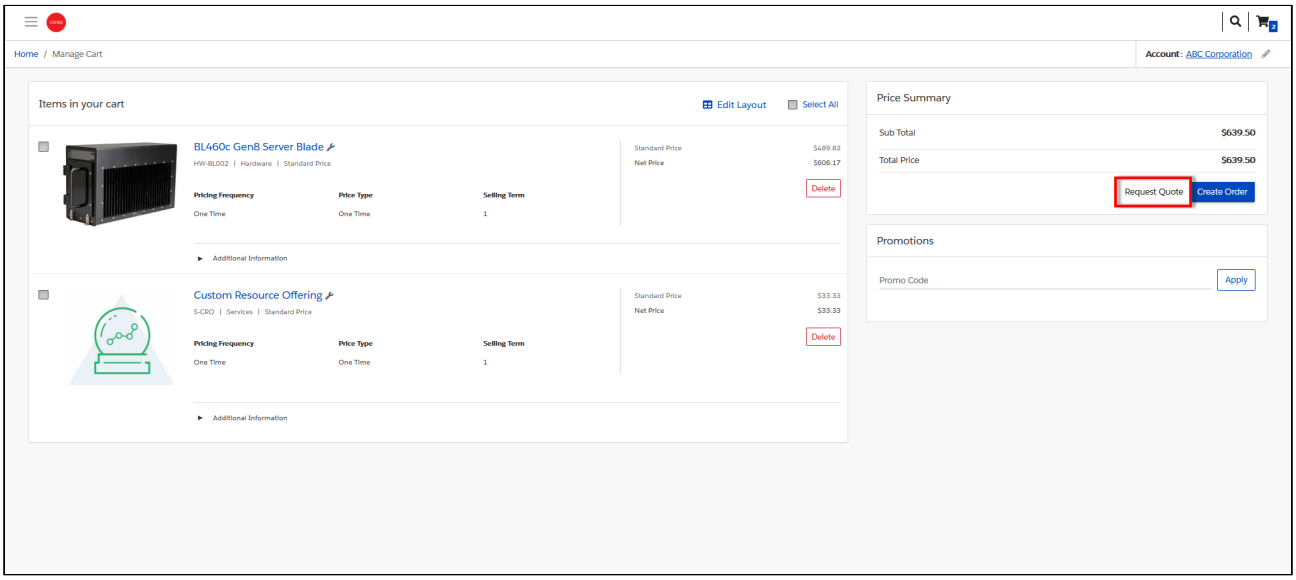


The Request Quote page appears. Enter details for the quote on the Request Quote page.

## To request a quote

1. Enter a meaningful **Quote Title**.
2. Enter a **RFP Response Due Date** by which you are expecting a response on the quote request.
3. By default, the **Primary Contact** is auto-populated with your name. You can choose to change the primary contact to another contact associated with your account.
4. By default, the **Ship To** and **Bill To** fields are auto-populated with your account along with the address.
5. You can add **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.


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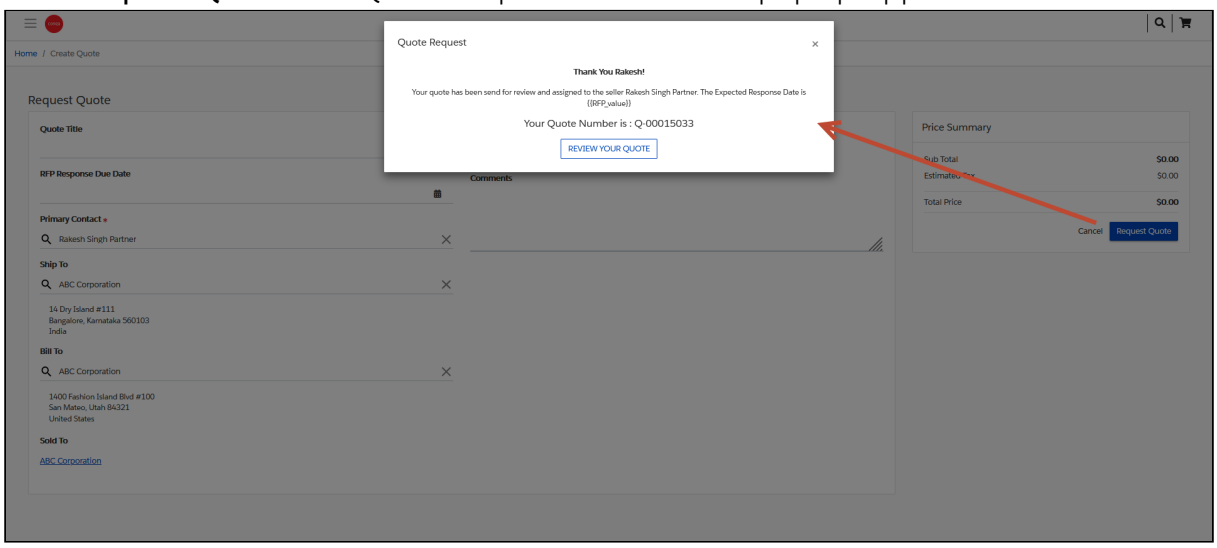
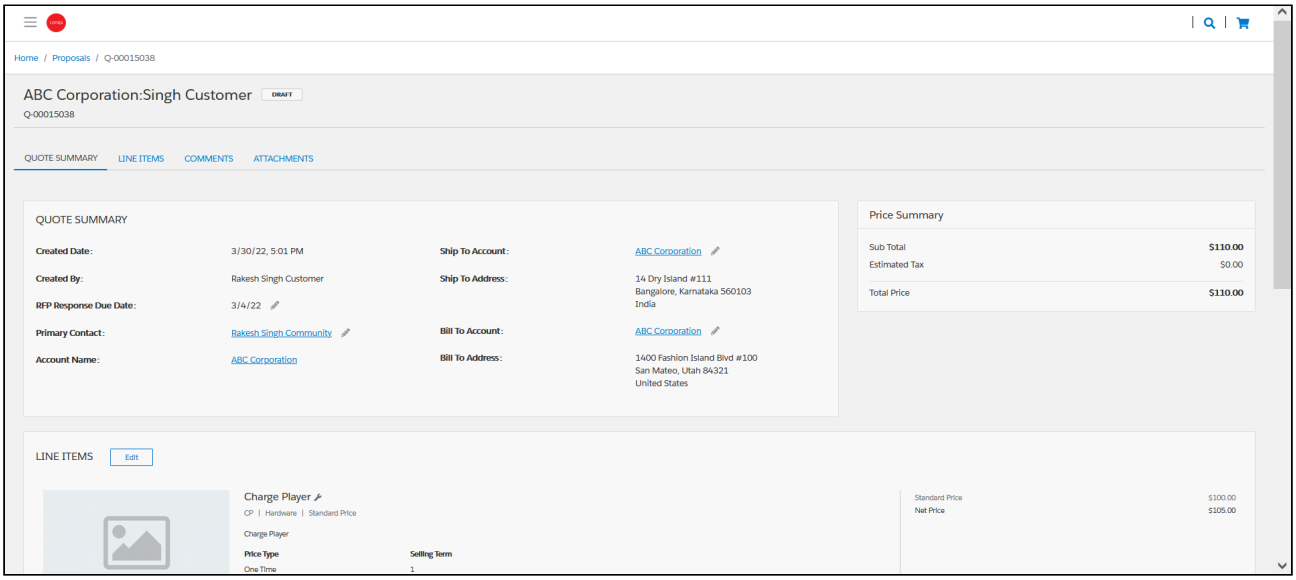
6. Click **Request Quote**. The Quote Request confirmation pop up appears.




# Viewing and Modifying a Requested Quote

After you have requested a quote, you can view your requested quote and also track the status of the quote from the Request Quote confirmation page. To view all the quotes created by you and belonging to the same account, go to My Account > Quotes page.




You can also view and accept quotes that are presented to you for review and proceed to place the order.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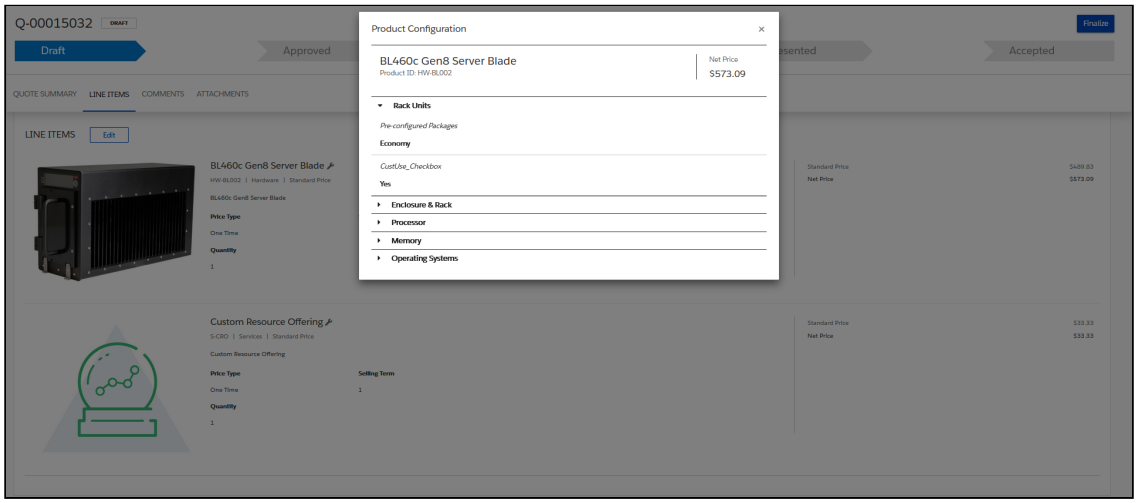
# To view and modify a quote

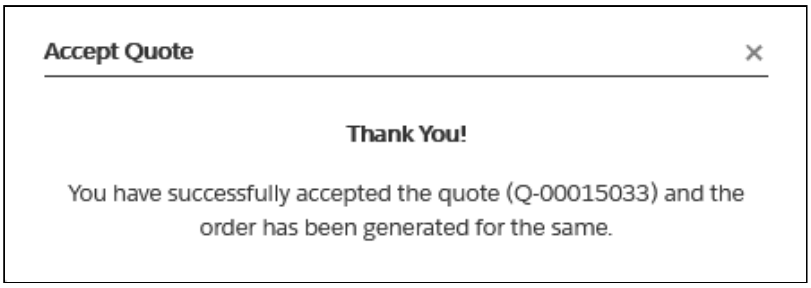
1. From the Quote Request confirmation popup, click REVIEW YOUR QUOTE button. The quote page appears where you can view and update the following:
    a. Quote Summary - You can update the Quote Title, RFP Response Due Date, Primary Contact, Ship To Account, and Bill To Account.
    b. Line Items - You can edit the line items in a requested quote to add, modify or delete items. Clicking the wrench icon next to a line item opens the Product Configuration popup.

    > ⚠ You can only modify the line items when the quote is in Draft stage.

    c. Comments and Attachments.

Upon receiving confirmation, click the Finalize button that moves the status of the quote from Draft stage to Approved stage. You can now accept the quote by clicking the Accept Quote button. The Accept Quote confirmation popup appears.




An order is generated for the quote. You can view and track the status of the order from My Account > Orders.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# Managing 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
- View the *Assets By Price Type* and *Asset Amounts By Price Type* charts on the Installed Product page
- Enable or Disable ABO on the Template
- Enable or Disable Renew or Terminate actions on the 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:


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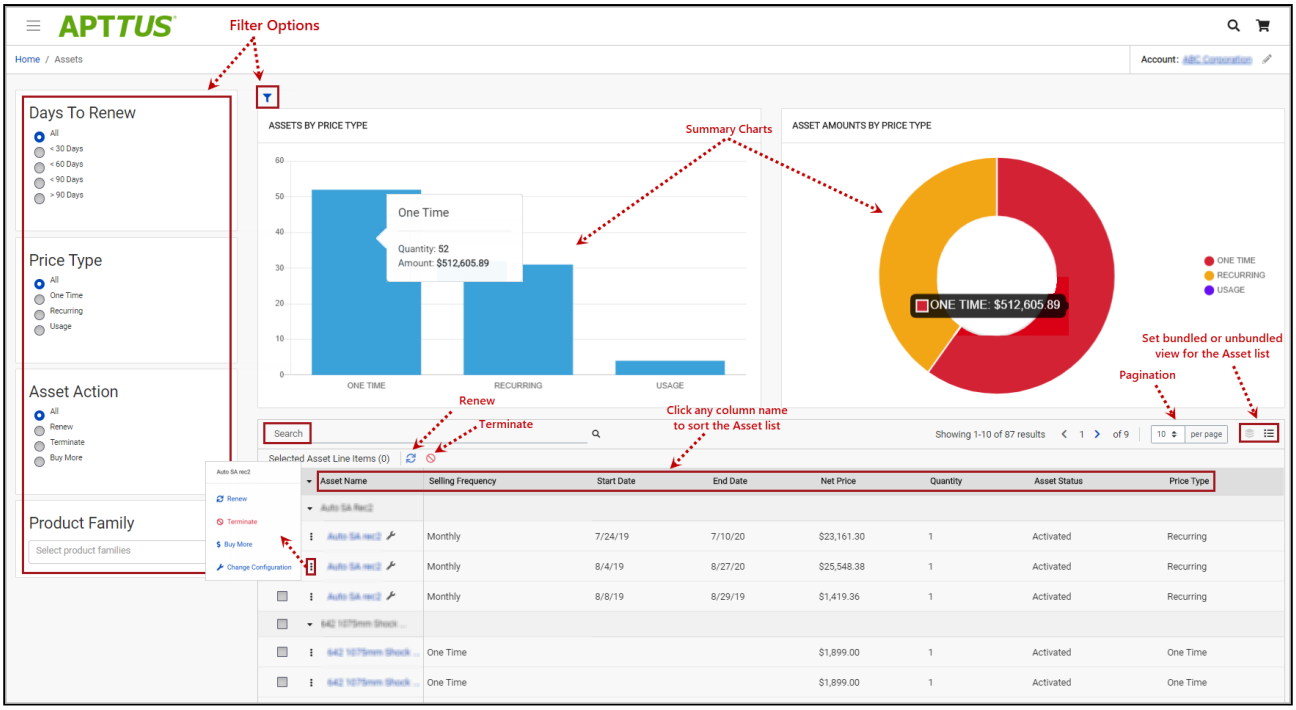
- View Summary Charts for Assets
- Filter an Asset
- Search an Asset
- Renew an Asset
- Terminate an Asset
- Buy More Assets
- Change Configuration

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 ( Search )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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, the existing option Line Status = "Cancelled" and the new selected option Line Status = "New". The Cart displays both the options with Line


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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"

# 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 on the cart
- Apply coupon based promotions on the cart
- Apply multiple promotions and coupon codes to a cart with OR and AND conditions
- View all applied promotions for a given cart
- View details of applied promotions for a line item in the cart
- View promotion details at the line item level for a given promotion
- View total promotion discount on the cart
- Enable or disable promotions on the template

The promotions package is available as an add-on with the CPQ license and package. To install packages, see Installing Digital Commerce Package.

You can define promotions using Promotions admin. For more information, see Defining Promotions.

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. You can apply multiple promotions and coupon codes with AND and OR condition through the Scope section. For more details, see *Defining the Scope of a Promotion* in the *CPQ documentation*.


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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.

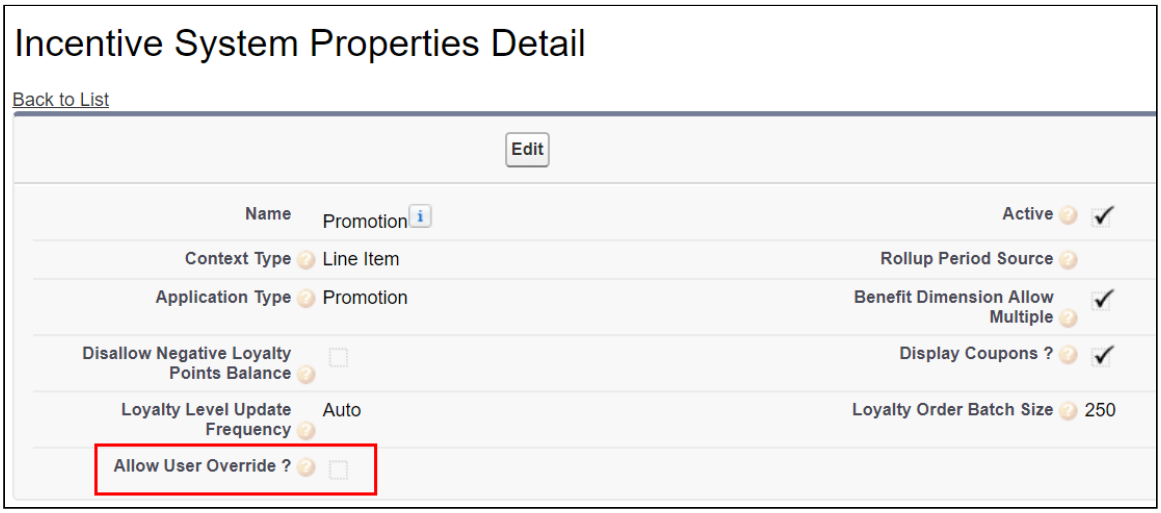
# To apply promo code

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

A given promotion can be applied to one or more line items in a cart. Promotion can be automatically applied to the cart line items on pricing or can be manually applied by providing coupon codes 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 the "Coupon Codes" field and running the update price, promotions are applied. Each Line Item aggregates the total promo adjustment amount applied from one or multiple adjustment line items in the field "Incentive Adjustment Amount". If a single promotion is applied, the promotion code is also stored at the line item level, in the "Coupon Code" field. Details of the promotions applied are captured in the "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.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# 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 in user, you can view the comparison of the product features and choose to add the product to the cart directly from the comparison page.


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# Digital Commerce SDK

This section describes the APIs and UI component references used to build a Digital Commerce storefront for your customers.

| Topic | Description |
|---|---|
| What's Covered | This section is designed to provide information related to reference templates, base libraries, models, components that can be inherited and reused. This section also provides information related to Services that suffice most of the business logic. For example: Create Order, Create Quote, and more. |
| Primary Audience | The intended audience is the developer assigned for creating and maintaining new storefronts on a Salesforce org using Conga packages. |
| IT Environment | For information pertaining to the requirements and recommendations, see System Requirements and Supported Platforms Matrix. |
| Updates | For a comprehensive list of updates for each release, see What's New in Digital Commerce Documentation. |
| Other Resources | • See Digital Commerce for Administrators for implementation and deployment procedure.<br>• See Digital Commerce for Users for basic admin tasks and end-user experience.<br>• See Digital Commerce for REST API Developers for details of the CPQ REST APIs consumed by Digital Commerce.<br>• See CPQ documentation for detailed information on setting up the master data. |

This SDK outlines the following:

- Overview and dependencies
- Upgrade Information
- Modules
- Components
- Classes
- Injectables
- Guards
- Interfaces


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- Pipes
- Miscellaneous

Before using Digital Commerce, you must be familiar with the following:

- Basic Salesforce administration
- Salesforce and Conga terms and definitions

Select one of the following topics for more information:

- SDK Reference


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# SDK Reference


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# Digital Commerce for REST API Developers

This section provides the details of the CPQ REST APIs that are used by the Digital Commerce application.

| Topic | Description |
|---|---|
| What's Covered | This section is designed to provide administrators with information on the micro-service architecture that enables commerce into any part of an application. |
| Primary Audience | Admin users responsible for installing, implementing, and deploying the Digital Commerce solution. |
| IT Environment | For information pertaining to the requirements and recommendations, see System Requirements and Supported Platforms Matrix. |
| Updates | For a comprehensive list of updates for each release, see What's New in Digital Commerce Documentation. |
| Other Resources | • See Digital Commerce for Administrators for implementation and deployment procedure.<br>• See Digital Commerce for Users for basic admin tasks and end-user experience.<br>• See Digital Commerce SDK for technical instructions on the installation and setup of a Digital Commerce storefront.<br>• See CPQ documentation for detailed information on setting up the master data. |

This section outlines the following CPQ REST APIs:


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- Authentication
- Storefront
- Account
- PriceList
- Catalog
- Carts
- Cart Items
- Generic
- Order
- Quote
- Assets
- Collaboration Request

Before using Digital Commerce, you must be familiar with the following:

- Basic Salesforce administration
- Salesforce and Conga terms and definitions

Select one of the following topics for more information:

- CPQ REST API Version 4

# CPQ REST API Version 4

**(Open API documentation is only available to view online)**


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# Digital Commerce Features by Release

Review the latest Digital Commerce Features by Release document.

- Features by Release

## Features by Release

This document contains an overview of features introduced in each major release of Digital Commerce. For more information, see Digital Commerce Features by Release.


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# Conga Customer Community & Learning Center Resources

The Conga Customer Community is your one-stop shop for success!

After registering as a new member, you'll gain access to a wide variety of resources, from a personalized onboarding checklist to free expert-led webinars, to our thought-leadership blog! It's also your portal to manage your Conga account, access the Install Center, and submit support tickets.

You can also access the Conga Learning Center. All customers get access to a limited catalog of getting started courses. Consider upgrading to the Conga Learning Pass to unlock the premium training subscription.

## Ready to get started?

Log into the Conga Customer Community with your credentials.

Not yet registered? No problem. Set up an account to receive your login credentials via our registration page.

After you log in, there are 2 ways to access the Conga Learning Center:

- On the main page, click the Learning Center tile.
- Navigate to the "Resources" dropdown menu at the top, then click the "Learning Center" option.


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For additional resources and support, please visit https://community.conga.com.

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