Order Management on Salesforce

Summer 2020 User Guide

Table of Contents

About this Guide

The *Order Management on Salesforce User Guide* is designed to provide customer sales and support representatives with information for managing the life of a generated order before it creates or updates an asset. This guide covers the major features that are provided with the Apttus Order Management license, including changes to in-flight orders, partial orders from contract price agreements, and management of customer purchase orders. Many of the topics in this guide cover tasks that can be considered part of an overall workflow for Apttus purchase and revenue management products – therefore familiarity with Apttus Configure Price Quote (CPQ) products are highly encouraged to understand and execute Order Management concepts and tasks.

Topic	Description
What's Covered	This guide walks sales users through the Order Management workflow and lifecycle, from the generation of order to creation of assets, fulfillment tracking, and integration with downstream services. It provides conceptual information, step-by-step instructions, and use cases for the features provided by Apttus Order Management.
Primary Audience	• Customer Support Representative • Sales Representative
IT Environment	Refer to the latest *Order Management on Salesforce Release Notes* for information on System Requirements and Supported Platforms.
Updates	For a comprehensive list of updates to this guide for each release, see the What's New topic.
Other Resources	• Order Management on Salesforce Admin Guide: Refer to this guide for installing and setting up Order Management in your organization. • Order Management on Salesforce Release Notes: Refer to this guide for the new feature, enhancements, resolved, and known issues. • Order Management on Salesforce SOAP API Guide: Refer to this guide for documentation of public-facing SOAP APIs for Order Management. • CPQ on Salesforce Administrator Guide: Refer to this guide for setting up products, price lists, and constraint rules.

This guide describes the following tasks:

- Managing orders in the Quote-to-Cash Process
- Managing order lifecycle and status
- Creating direct orders for accounts
- Creating partial orders from customer price agreements (quote/contract)
- Managing in-flight order changes and cancellation
- Managing distributed order fulfillment
- Activating an order
- Billing for an order
- Creating customer purchase orders

Before using Order Management, you must be familiar with the following:

- Basic Salesforce Administration knowledge
- Apttus CPQ and Apttus CLM administration
- Salesforce and Apttus terms and definitions

What's New

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

Document	Topic	Description
Summer 2020 REV A	Splitting an Order	Updated the description of the Manual Split.
Summer 2020	Splitting an Order	New Topic.
	Creating Order Workflows to Automate Split Order	New Topic.
Spring 2020	About Order Management	Updated topic with additional key terminology.
	Creating Order Workflows to Automate In-Flight Order Changes	Updated topic with additional contextual information and tasks. Added a workflow ruleset use case.
	Creating Data Enrichment and Validation Rules	Updated topic to include a detailed use case.
Winter 2019	About This Guide	Updated topic.
	About Order Management	Updated topic.
	Order Management in the Quote-to-Cash Process	Deleted topic.
	Getting Started	Deleted topic.
	Logging in to Order Management	New topic (replaced "Getting Started").
	Navigating the Order Management User Interface	New topic.
	Understanding the Order Management Lifecycle	Topic renamed from "Getting Around with Order Lifecycle and Status." Updated topic.
	Order Status	Deleted topic.
	Order Line Item Status	Deleted topic.

Document	Topic	Description
	Understanding Order Status	New topic (replaced "Order Status" and "Order Line Item Status").
	Capturing Orders	Updated topic.
	Creating Orders from Quotes	Deleted topic. This information refers to a CPQ process.
	Creating E-Commerce Orders	Deleted topic. This information is redundant and covered in the API Guide.
	Creating Direct Orders for Accounts	Updated topic.
	Configuring and Pricing Orders	Deleted topic. Note on configuring and pricing added to Creating Direct Orders for Accounts.
	Finalizing Configurations	Deleted topic.
	Confirming Orders	Deleted topic. Content added to parent topic.
	Legal Entity on Order Line Item	Deleted topic. Content added to Activating an Order.
	Cloning an Order	Updated topic.
	Managing In-Flight Order Changes and Cancellation	Updated topic.
	Amending an Order	Renamed topic from "Changing an In-flight Order." Updated topic.
	New UI for Amend Order	Deleted topic.
	Cancelling an Order	Updated topic.
	Creating Order Workflows to Automate In-Flight Order Changes	Renamed and updated topic.
	Versioning of an Order	Deleted topic. Content added to "Managing In-Flight Order Changes."

Document	Topic	Description
	Sample Scenarios for Amending Orders Using Workflow Rules	New topic. Content moved from Admin Guide.
	Order Management Workflows	Deleted topic.
	Agreement to Order	Deleted topic. This is a CLM task.
	Quote to Order	Deleted topic. This is a CPQ task.
	Direct Order Configuration	Deleted topic. Content added to Creating Direct Orders for Accounts and Releasing Orders to Fulfillment Systems.
	Asset Manager	Deleted topic.
	Total Order Amount on Order Header	Deleted topic. Content added to Capturing Orders.
	Working With Customer Price Agreements	Renamed and updated topic.
	Creating Partial Orders from Price Agreements	Renamed topic.
	View List of Quotes/Agreements	Deleted topic.
	View List of Line Agreements from Price Agreements	Deleted topic.
	Rollup Order Line Item Information to Agreement Line Item	Deleted topic. Content added to Creating Partial Orders from Price Agreements.
	Rollup Order Line Item Information to Quote Line Item	Deleted topic. Content added to Creating Partial Orders from Price Agreements.
	Creating Partial Order from Agreement Enhancements	Deleted topic. Content added to Working With Customer Price Agreements.
	Working With Distributed Order Fulfillment	Updated topic.

Document	Topic	Description
	Releasing Orders to Fulfillment Systems	Renamed topic. Updated topic.
	Tracking Order Fulfillment	Renamed topic. Updated topic.
	Order Fulfillment	Deleted topic. Content added to Releasing Orders to Fulfillment Systems.
	Order Fulfillment Line Items	Deleted topic. Content added to Releasing Orders to Fulfillment Systems.
	Order Fulfillment Line Item Lifecycle	Deleted topic. Content added to Releasing Orders to Fulfillment Systems.
	Activating an Order	Updated topic.
	Billing for an Order	Updated topic.
	Working with Customer Purchase Orders	Updated topic.
	Understanding Customer Purchase Order Status	Renamed topic from "Customer Purchase Order and PO Item Status Mapping." Updated topic.
	Managing CPO Validation and Enrichment Rules	Updated topic.
	Creating Data Enrichment and Validation Rules	Renamed topic from "Creating Rulesets." Updated topic.
	Creating Rulesets	Deleted topic. Content added to Creating Data Enrichment and Validation Rules
	Creating Rules	Deleted topic. Content added to Creating Data Enrichment and Validation Rules
	Mitigating Data Validation Issues	Updated topic.

Document	Topic	Description
	Creating Customer Purchase Orders	Updated topic.
	Accepting Customer Purchase Orders	Renamed topic from "Confirming or Accepting Draft Customer Purchase Orders." Updated topic.
	Amending Customer Purchase Orders	Updated topic.
	Cancelling Customer Purchase Orders	Updated topic.
	Creating Sales Orders from a Customer Purchase Order	Renamed topic from "Managing Customer PO." Updated topic.
	Creating a Single Order	Updated topic.
	Creating Multiple Sales Orders	Updated topic.
	Creating Partial Orders	Updated topic.
Summer 2019	Creating Order Workflow to Automate In-flight Order Changes	New topic. New feature for this release.
Spring 2019	No Updates	No new topics are added for this release. The guide is updated to reflect product name changes.
Winter 2018	Total Order Amount on Order Header	New topic. New feature for this release.
	Legal Entity on Order Line Item	New topic. New feature for this release.
	Creating Partial Order from Agreement Enhancements	New topic. New feature for this release.
Summer 2018	Managing CPO Validation and Enrichment Rules	New topic. New feature for this release
	Mitigating Data Validation Issues	New topic. New feature for this release
	Managing Customer PO	New topic. New feature for this release
	Order Fulfillment Line Item Lifecycle	New topic. New feature for this release

Document	Topic	Description
	Creating Customer Purchase Orders	New topic. New feature for this release
	Creating Partial orders from Customer Price Agreement (Quote/ Contract)	New topic. New feature for this release
	Intelligent Order Assistant (Max for OM)	New topic. New feature for this release

About Order Management

An order is a document that serves as a confirmation of a purchase created for a customer before delivering goods or services. Apttus Order Management allows customer sales and customer support representatives to manage the life of the generated order before it creates or updates an asset. Order Lifecycle Management offers a common, streamlined process for managing orders regardless of the channel used for their creation – direct sales, partner sales, telesales, digital commerce, and Electronic Data Interchange (EDI) – through the lifecycle of the order through fulfillment.

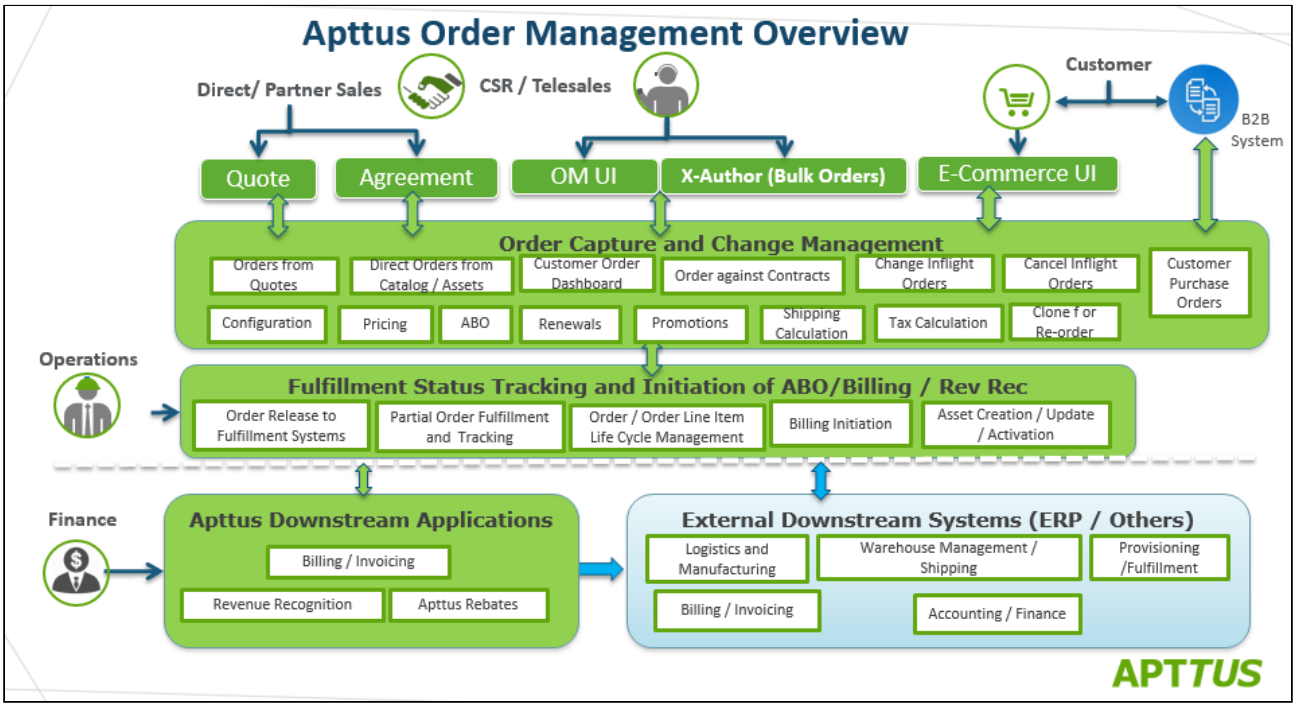
The three main stages of the lifecycle are:

- Order Capture: In this stage, users can create direct orders through the Order Management interface, create customer purchase orders from a quote, and create digital commerce orders.
- Order Change: In this stage, users can make changes to configuration, pricing, shipping, promotions, change or cancel in-flight orders, and reorder before the order has created or updated an asset.
- Order Fulfillment Tracking: In this stage, the order is released to multiple fulfillment systems and locations. Order fulfillment can be tracked and managed at the order and order line item level.

Apttus Order Management allows users to integrate with external systems, including ERP, logistics and manufacturing, accounting and finance, and warehouse management.

Advanced features within Order Management include design of custom validation and enrichment rules for purchase orders, as well as automation of in-flight order changes.

The following diagram shows the interaction with different entities at various stages in the omni-channel sales process.



Apttus Order Management allows a user to perform the following tasks:

- Managing order lifecycle and status
- Creating direct orders
- Creating partial orders from a customer price agreement (Quote/Agreement)
- Managing in-flight order changes and cancellation
- Managing distributed order fulfillment
- Activating an order
- Billing for an order
- Managing customer purchase orders
- Creating partial and split sales orders from customer purchase orders
- Creating data enrichment and validation rules for partial orders

Apttus currently supports order creation through direct and partner sales and digital commerce interfaces. From the Order Management interface, customer support representatives can create orders on behalf of customers.

Key Terminology

It is important to understand how terms are used when working with Apttus Order Management.

Term	Description
ABO	Asset-based ordering (ABO) functionality enables the customers to manage their existing subscriptions or install base using actions such as change, renew, swap, and terminate.
Administrators	Individual responsible for installing, configuring, and maintaining Order Management software, including creating direct orders, customer purchase orders, and managing partial order fulfillment and automation.
Assets	Assets define a purchased product or service. An asset is associated with an account. After being processed and fulfilled, the line items associated with new quotes, agreements, or orders result in the creation of new assets, which can then be viewed or managed from the customer's account.
Amend Order	An action a user can take from the order record page. You can use Amend Order to create a new version of the Order classified as an amendment with changes to the field values of the order.
Attributes	Features of a product, such as color, size, weight, and more.
Bundled Products	A combination of standalone products that offer added value to the customer while increasing overall sales.
Cart	A product and pricing view for the user to review all configuration and pricing information at a glance.
Catalog	A view that allows hierarchical categorization of products for users to search through and add to their configuration.
Clone	To replicate a field, record, template, etc.
Clone Order	An action a user can take from the order record page which creates a copy of the order record.

Term	Description
Contract Price List	A price list that helps the customer keep track of specific price agreements as applicable for that account.
Customer Purchase Order	A customer document that represents the initial offer of negotiated types, quantities, and prices for products or services. Customer Purchase Orders can be created by sales users or administrators as sales orders for long-term contracts.
In-Flight Order	The flow status of an order that is in the process of fulfillment.
Order	A document that serves as a confirmation of a purchase created for a customer before delivering goods or services. The Order object is used in Order Management to capture and track orders created from quotes, agreements, or other sources, such as customer purchase orders.
Order Fulfillment Line Items	A line item on the order record that comprises order fulfillment information for the record. Order fulfillment line items are displayed in the Order Fulfillment Line Items related list.
Order Line Item	A line item on the order record corresponding to a product, bundle, or service that is part of the order. Order line items are displayed in the Order Line Items related list.
Order Line Item Status	A column on the Order Line Items related list. This status refers to the current status of the corresponding line item. The possible status values are: PartiallyFulfilled, InFulfilment, Pending, Draft, Accepted, In-Amendment, BeingAmended, Superseded, Activated, Pending Cancellation, BeingCancelled, Cancelled, and Fulfilled.
Order Number	The unique ID of an order.
Order Source	A field on the order record that specifies the source from which an order is created. For example: Account, Quote, or an Agreement.
Order Status	A field on the order record that denotes the status of an order that you have created or updated. The possible status values are: PartiallyFulfilled, InFulfilment, Pending, Draft, Accepted, In-Amendment, BeingAmended, Superseded, Activated, PendingCancellation, BeingCancelled, Cancelled, and Fulfilled.

Term	Description
Partial Order	An order placed against a price agreement or customer purchase order for a partial amount of the committed quantities captured for an order.
Price Agreement	An agreement associated with a generated contract price list that represents the negotiated pricing and quantity commitments for one or more configurations of products and services.
Price Lists	Containers of items that are grouped in a price list. A price list controls which products are visible to the end user. A price list contains several price list items; each linked to a product. A product can be set up with one or more price list items.
Price Matrix (Matrices)	These are an advanced pricing concept used to define tiered pricing paradigms, or complex pricing structures with multiple criteria. Common examples are pricing tiers for a product based on user count or particular customer or transactional dimensions.
Price Rule	Represents a single rule in a price ruleset.
Price Rule Sets	Price Rulesets are a mechanism to allow particular families, categories or groupings of products to have either line item pricing adjustments applied or summary pricing adjustments applied. Typical examples of these are volume discounting rules or promotional pricing rules.
Product	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.
Product Attribute Group	Represents a product attribute group that contains attributes shared by products.
Product Attribute Value	Represents the attribute values for a product class. For example, color has attribute values such as red, green, blue, orange and so on.
Product Group	A logical grouping of one or more product records. This construct allows you to create combinations of products with similar characteristics/qualities for use in a Rule.

Term	Description
Quote or Proposal	A structured definition of a prospective sale that contains product configurations, pricing, and customer opportunity information.
Standalone Products	Refers to a device or software that is self-contained, one that does not require any other devices or software to function.

Logging in to Order Management

Log in to your Salesforce.com org to access Apttus Order Management.

> Do not use the Back button on your browser when using Order Management.

Before logging in to Order Management, make sure you meet the following criteria:

- All required Order Management packages (included Apttus CPQ packages, and packages for other integrated Apttus applications) have been installed by an administrator.
- You have login credentials provided by Apttus.

To log in to Order Management

1. Go to https://salesforce.com/.
   Or
   If your organization is using a sandbox or test environment to access Apttus Order Management (for example, if you are doing user acceptance testing), go to https://test.salesforce.com/ instead.
2. From 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**.
4. Navigate to Apttus Order Management:
   - In Salesforce Classic: Click the App Menu and select **Apttus Order Management**.
   - In Salesforce Lightning Experience: Click the App Launcher and select **Apttus Order Management**.

Navigating the Order Management User Interface

The Order Management User Interface (UI) is presented to the user similarly to many other Apttus applications on Salesforce. The default landing page for Order Management takes you to the Order tab, which displays a list of Recent Orders and links and options in the Salesforce sidebar to the left (Salesforce Classic).

You can use standard Salesforce functionality such as global search, dashboard controls, tabs, and menus to navigate to various Order Management pages. Refer to Salesforce documentation for any differences in navigation using Salesforce Classic versus the Lightning Experience.

Apttus Order Management provides a number of tabs to use its various features. Refer to the following table for brief descriptions of each tab:

> Note: Configuration of certain tabs require administrator privileges or user permissions. Contact your administrator if you do not have access to any of the tabs described below.

Tab	Description	Help Topic(s)
Orders	Default landing page for the Order Management application. View, manage, and create new direct orders from this page.	Capturing Orders, Creating Direct Orders for Accounts
Order Workflow Rulesets	Use this tab to view, create, and manage Order Workflow Rulesets.	Creating Order Workflows to Automate In-Flight Order Changes
Order Fulfillments	Use this tab to view and manage Order Fulfillments.	Working With Distributed Order Fulfillment, Releasing Orders to Fulfillment Systems
Order Fulfillment Line Items	Use this tab to view, create, and manage Order Fulfillment Line Items.	Working With Distributed Order Fulfillment, Releasing Orders to Fulfillment Systems

Tab	Description	Help Topic(s)
Price Agreement	Use this tab to view Price Agreements created from Quote/Proposals and/or Agreements. Create partial orders from Contract Price List Items.	Working With Customer Price Agreements
Customer Purchase Orders	Use this tab to view and manage Customer Purchase Orders. Create and manage purchase orders and purchase order items, and create sales orders, split, and partial orders from purchase orders. View and add attachments to purchase orders.	Working with Customer Purchase Orders, Creating Sales Orders from a Customer Purchase Order
Config Settings	Use this tab to manage config settings and system properties. Refer to the *CPQ on Salesforce Administrator Guide* for more information.	
Data Validation/ Enrichment Rulesets	Use this tab to create and manage Data Enrichment and Validation rulesets for Customer Purchase Orders.	Managing CPO Validation and Enrichment Rules
PO Admin	Use this tab to create and manage Data Enrichment and Validation rules for Customer Purchase Orders.	Managing CPO Validation and Enrichment Rules

Working in the Apttus User Interface

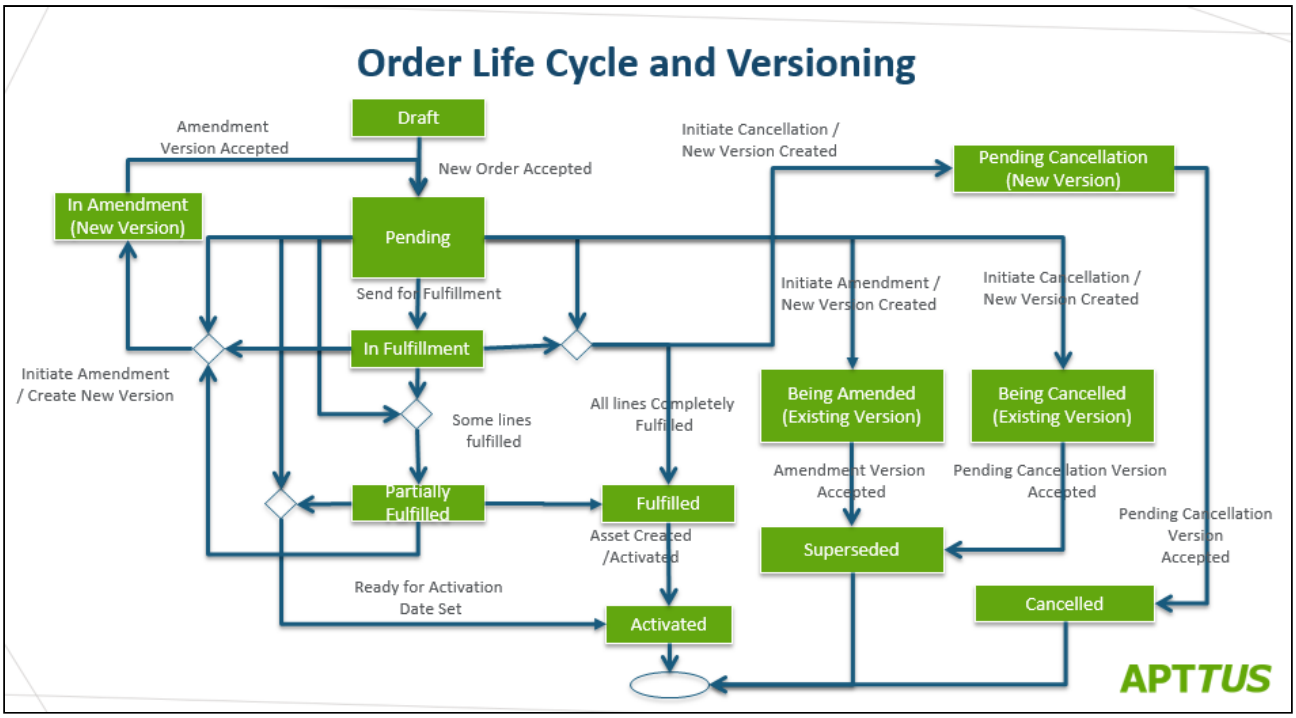
Several features of Order Management use a custom user interface provided by Apttus. The following provides a brief summary of UI controls and features:

- To search for records using a type-ahead field (marked by the lookup ( ) icon), enter text in the field and select a result to refresh the list.
- Click a column header name to sort the list by that column.
- Click the filter ( ) icon in the column header, enter a filter string, and click **Apply** to filter the list by column value.
- Use the pagination controls to change the number of rows per page or to move between pages.
- When working with forms, use the date picker ( ) to select a date value for the field.

Understanding the Order Management Lifecycle

Using Order Management, customer support representatives can track an order through its entire lifecycle to asset creation. Order fulfillment status can be tracked at the order level or at the individual line item level.

The following diagram represents a high-level lifecycle flow for orders created in Apttus Order Management.



Orders begin in **Draft** status, either through direct order creation or conversion from a Quote or Agreement (in Apttus CPQ or CLM). From here, a **Pending** order can be confirmed or **Amended**. After an order is confirmed, it moves to fulfillment status, either as a **Partially Fulfilled** order, or **Fulfilled** and **Activated**. Orders can also be **Cancelled**, either initiated manually, or superseded by a new version.

Understanding Order Status

Order and Order Line Item status work as a mechanism to integrate with downstream systems and processes including fulfillment systems, asset management, billing, and revenue recognition.

- Order Header Status
- Order Line Item Status

> The majority of actions described in this topic that assign status to an order or order line items can also be executed using Order Service APIs. For information on how to use Order Service APIs, refer to the *Order Management on Salesforce SOAP API Guide*.

Order Header Status

The following table describes Order Status at the order level and the events and actions that assign status to an order.

Order Status	Description	Event / Action
Draft	When an order is initially created, its default status is "Draft."	**New Order** Creating a new order from the Order page or a related list will create the order in "Draft" status. Draft orders are work-in-progress orders and can be opened and edited without creating new versions. Ensure that "Draft" is the default status when creating orders and order line items. You can change the quantity of an order from the cart even when the order is in "Draft" status. You can also clone an existing order to create a new order. For more information, see Cloning an Order.

Order Status	Description	Event / Action
Pending	When an order is confirmed by a customer but is pending for validation. Such orders and all the order line items have a "Pending" status.	**Accept Order / Accept Quote / Activate Agreement** An order is confirmed when the Accept button is clicked on the Order or Quote record, or when an Agreement is Activated. Accepting an order will change the status of the order and order line items to "Pending" if **Auto Activation** is not enabled. To generate orders in "Pending" status from quotes and agreements, ensure: • **Auto Create Orders** for quotes is set to "True" Go to **Custom Settings** > **Proposal System Properties** to apply this property. • Auto **Create Order** for agreements is set to "True" Go to **Custom Settings > Comply System Properties** to apply this property. • **Auto Activate Order** is set to "False" You are allowed to cancel an order when it is in "Pending" status. **Undo Cancel Order** When you click **Undo Cancel Order**, the order reverts the new version to the previous version, which then displays "Pending" status.

Order Status	Description	Event / Action
In Fulfillment	The Order and Order Line Item status changes to "In Fulfillment " when order fulfillment begins. This means that one or more line items are in ('In Fulfillment') AND other line items are in "Pending" status	**Send for Fulfillment** You can set the status to "In Fulfillment" when the Order and Order line items are exported to fulfillment systems to initiate the fulfillment process. It indicates that the order has been released to the fulfillment systems and the fulfillment process has begun. You are allowed to cancel an order when it is in "In Fulfillment" status. **Undo Cancel Order** When you click **Undo Cancel Order**, the order reverts the new version to the previous version, which then displays "In Fulfillment" status.

Order Status	Description	Event / Action
Partially Fulfilled	When one or more line items are in "Partially Fulfilled" status. OR If one or more line items are IN ('Activated', 'Fulfilled') status AND one or more IN ('In Fulfillment' OR 'Pending') status.	**Create Order Fulfillment Line Items** You can manage and track partial fulfillment for an order by creating order fulfillment line items against a given order line item. This updates the "Fulfilled Quantity" on the order line item level and also updates the status of the order line item to "Partially Fulfilled" or "Fulfilled" or "Activated." **Activate a Subset of Order Line Items** A subset of order line items can also be manually activated by setting the "Ready for Activation Date" field on the corresponding line items. When a subset of the order line items is activated, the overall order status is set to "Partially Fulfilled."

Order Status	Description	Event / Action
In Amendment	This status is set on an "In-Flight" order (in "Pending", "In Fulfillment", or "Partially Fulfilled" status) when changes have been made to the existing order. This status represents work-in-progress changes to the order that have not yet been confirmed (similar to a "Draft" order).	**Amend Order** Amending an order creates a new version of the order to make and track changes and a reference to the previous version. The previous version of the order and order line items are "Superseded," once the work-in-progress (In Amendment) changes are confirmed on "Accept" of the "In Amendment" order. Amending an In-Flight order allows you to make the following changes: • Change the start date or end date of subscription on one or more order line items that are in "Pending," "In Fulfillment," or "Partially Fulfilled" status. • Make subscription date changes on the standalone item, bundles, and multiple charge line items.

Order Status	Description	Event / Action
		• Cancel or add new line items, and change their quantities, pricing, and discounts. The change in subscription start and/or end date will recalculate the price for the line item or bundle after the changes are applied. The changes to the order line items are also reflected in the corresponding assets. When In-Flight Order Changes is enabled, assets are only created on activation of the order line item. **Note:** Any order configured directly or generated from a quote, agreement, or E-Commerce can be amended. To change order line item quantities, the field "Is Quantity Modifiable" must enabled at the line item level for product configuration. **Undo Amend Order** If you proceed with Undo Amend Order, it reverts the new version to the previous version, which then displays a the status of the original order (for example, "Partially Fulfilled").

Order Status	Description	Event / Action
Being Amended	This status is set when an "In-Flight" order (in "Pending," "In Fulfillment," or "Partially Fulfilled" status) is in the process of being amended. This status is assigned to the previous version of the order when an existing order version is in the process of being amended. This status represents that this version is being amended and, once the new changes are confirmed, this version will be superseded by the new order.	N/A
Fulfilled	All line items in "Fulfilled" status OR One or more line items are IN ('Fulfilled') status AND One or more line items are IN ('Activated') status	N/A
Activated	The order fulfillment process is complete and ready for the initation of additional related downstream processes (billing, revenue management, and so on).	**Auto Activate Order** Orders can be automatically activated by configuring the **Auto Activate Order** setting, or by providing a "**Ready for Activation Date**" on the Order or Quote header before accepting the corresponding order or quote. **Activating All Order Line Items** If all Order Line Items are independently fulfilled and activated, the entire Order will be activated.

Order Status	Description	Event / Action
Superseded	This status is set on the previous version of the order when the order version with the status "In Amendment" or "Pending Cancellation" is accepted.	**Accept Order** When an order with the "In Amendment" or "Pending Cancellation" status is accepted, the previous version status is set to "Superseded."
Cancelled	This status is set when an order is cancelled and accepted. Only orders in "Pending" or "In Fulfillment" status can be cancelled. You cannot "Undo Cancel Order" when an order has "Cancelled" status.	N/A
Pending Cancellation	This status is set on the new version of the order that is created for cancellation. The status of the order and its line items is set to "Pending Cancellation."	**Cancel Order** When you cancel an order, a new version is created for cancellation. This version is set to "Pending Cancellation" for both the order and its line items. To complete cancellation, click **Accept**. The status of the order is then set to "Cancelled." The order line items also undergo the versioning when you cancel or amend an order.
Being Cancelled	This status is set on the original order when an order is cancelled. Line items remain in "Pending" status. When order cancellation is accepted, the original order status along with its order line items is changed to "Superseded."	N/A

Order Line Item Status

The following table describes each Order Status at the order line item level. The status of orders and order line items can differ based on the stage of the order fulfillment.

Order Line Status	Description	Event / Action
Draft	The Order Line Item is initially created and the Order Status is "Draft."	Creating a New Order.
Pending	The Order is confirmed by a customer but is "Pending" for validation.	Accepting Quote/Order. When you perform the following actions, the order line item status changes to "Pending:" • **Undo Cancel Order** • **Undo Amend Order**
In Fulfilment	The Order Line Item has been sent for fulfillment. This Status helps in tracking the fulfillment process at the Order Line Item level.	Sending/Releasing Order to Fulfillment systems.
Partially Fulfilled	The Fulfilled Quantity is less than the Delta Quantity and the value is greater than zero.	Tracking Fulfillment for each Order Line Item by creating a corresponding Order Fulfillment Line Item.
In Amendment	A change has been made to the Order Line Item.	• Changes to order line items are also reflected in the corresponding assets. • When "In-Flight" order change capability is enabled, assets are only created on activation of the order line item. • Amending an order creates a new version of the order to make and track changes and has reference to the previous version. The previous version of the order and order line items have their status changed to "Superseded," once the work-in-progress ("In Amendment") changes are confirmed on **Accept** of the "In Amendment order".

Order Line Status	Description	Event / Action
Being Amended	This status is set when an "In-Flight" order line item (order in "Pending," "In Fulfillment," or "Partially Fulfilled") is in the process of being amended. This status is assigned to the previous version of the order line item when an existing order version is in the process of being amended. This status represents that this version is being amended and, once the new changes are confirmed, this version will be superseded by the new order line item.	**Amend Order**
Superseded	This status is set on the previous version of the order when the order related to the "In Amendment" order version is accepted, or when an order with the "Pending Cancellation" status is accepted.	**Accept Order** When the Accept action is used on an "In Amendment" or "Pending Cancellation" order, then the previous version is "Superseded."
Fulfilled	If the Fulfilled Quantity on the Order Line Item is equal to the Delta Quantity.	For the following events/actions: • On fulfillment of all Order Line Items. • Directly updating the status of Order Line Item to "Fulfilled."

Order Line Status	Description	Event / Action
Activated	The Order Line Item's status is set to *Activated* in any of the following three scenarios: Scenario 1: Line item activation is initiated once the order line item is "Fulfilled." Scenario 2: The Order is auto-activated. Scenario 3: The Order line item is manually activated. When Order Line Items are activated, the system initiates activation of the corresponding asset.	On Fulfillment of all Order Line Items. Providing a value for the **Ready for Activation Date** field on the Order.
Pending Cancellation	This status is set when an order is cancelled.	**Cancel Order**
Cancelled	This status is set when the cancelled order is accepted.	**Accept Order**

Capturing Orders

Apttus Orders are captured using a number of processes, usually depending on which sales channel the order is originating from. The table below describes at a high level what types of orders are generally tied to which type of sale channels. In some cases, a sales channel, such as direct sales, may capture orders using one or more different processes. The table below covers the most common use cases.

In all cases, orders are captured and stored in Salesforce as Order records. Product, service, and bundle data is stored in Orders as Order Line Items.

Sales Channel(s)	Order Management Process
Direct Sales, Partner Sales	• Captures an order from a Quote/Proposal • Captures an order from an Agreement (Contract) • Creates a direct order for an Account (Order Management UI)
Customer Service Representatives (CSR), Telesales	• Creates a direct order for an Account (OM UI)
E-Commerce, Partner Commerce	• Creates an order using Order Management APIs • Creates an order from a Customer Purchase Order

Total Order Amount on the Order Header

At any time during the ordering process, the total amount of the order is calculated and displayed in the Order Amount field on the order header.
Order Amount = SUM(Net Price) from order line items based on the following conditions:

- Any line item in "Cancelled" or "Pending Cancellation" status is not considered.
- If an option or child bundle price is rolled up to the parent bundle, the system considers the parent bundle net price to avoid double-counting.

The order amount is recalculated whenever the net price on an order line item is updated or when the status of the order line item is changed (to any status other than "Cancelled" or "Pending Cancellation").

Order Management Scope

It is important to consider that the most common use case for generating an order is through a Quote or Agreement. In these cases, orders are almost always automatically activated, meaning that the Order Management application plays a limited or no role in managing the order as it is usually automatically converted into an asset.

Order Management primarily focuses on providing users with the capability to make in-flight order changes, create partial orders from price agreements, and manage and create orders from customer purchase orders. You can create a direct order using Order Management, but even a direct order is mainly initiated by a CPQ or CLM user from the Quote or Agreement record.

For more information on creating and managing orders and assets from a quote, refer to the *CPQ on Salesforce User Guide* and supporting documentation.

For more information on creating and managing orders and assets from an agreement (contract), refer to the *CLM on Salesforce User Guide* and supporting documentation.

Creating Direct Orders for Accounts

Customer service representative or telesales person can directly create an order for a given account rather than going through the quoting process. Customers typically request for creating orders directly instead of going through the quote creation process in the following scenarios:

Request for Order Creation	Detail
Channel partners placing orders against channel price list.	Channel partners (Retailers, distributors) generally have a standard channel price lists. Channel partners can call customer service/telesales to place new orders.
Customers requesting new Orders at a standard price list.	Customers can call customer service/telesales to place new orders against the standard price list.
Order against pre-negotiated agreement/ rate card/price list.	Customer can place orders against already negotiated price list, rate card, or agreement. In this case, orders will be priced based on the pre-negotiated price.

Request for Order Creation	Detail
Add-on/change orders for previously purchased products.	Customers can place add-on orders, change orders, or renewal orders against previously purchased products /services/subscriptions.

- To create a new order from the Orders tab
- To create a new Order from the Account page

To create a new order from the Orders tab

1. Click the **Orders** tab. A list of recent orders is displayed.
2. Click **New**. The New Order page is displayed.
3. Enter values for the fields listed in the following table:

Field	Description
Type	Click the drop-down and select the order type: New, Add-On, or Renewal.
Status	Click the drop-down and select **Draft** status.
Source	Click the drop-down and select **Account**.
Sold To	Type the name of the Account in the search box and select it or click the lookup icon and search and select the account for this order.
Price List	Type the name of the Price List in the search box and select it or click the lookup icon and search and select the relevant Price List for this order.
Order Date	Click this field and select a date for the order from the date picker.
Auto Activate Order?	Click the check box to automatically activate the order when it is accepted.

4. Click **Save**. A new order is created.
5. Click the **Configure Products** button to open the Product Catalog. After finalizing the cart, order line items are created for the order.

> For step-by-step help customizing the Configure Products button to your business needs, and other tasks and information about creating and finalizing product configurations, refer to the *CPQ on Salesforce Administrator* and *User Guides*.

6. Click **Accept**. The following changes are made depending on whether or not you decided to automatically active the order:
   - If **Auto Activate Order** = False
     - The status of Order and Order Line Items is set to “Pending.”
     - Asset Line Items are created in the “Pending” status.
     - If "Ready for Billing Date" is set, billing schedules are generated.
   - If **Auto Activate Order** = True
     - The status of Order and Order Line Items is set to “Activated.”
     - Asset Line Items are created in the “Activated” status.
     - If "Ready for Billing Date" is set, billing schedules are generated.

To create a new Order from the Account page

> In order to create an order from an Account, the Orders (Sold To) related list must be added to the page layout. For more information, refer to the *Order Management on Salesforce Administrator Guide*.

1. Go to the **Accounts** tab (All Tabs > Accounts). The Accounts home page is displayed.
2. Find the Account for which you want to place an order. Click the **Account Name**. The Account Details page is displayed.
3. Hover over the **Orders (Sold To)** link above the Order header and click **New Order**.
4. Enter values for the Order fields as described in the previous task. The Sold To field is already populated with the Account Name.

   > Do not forget to ensure that the order is in "Draft" status.

5. Click **Save**.
6. Click the **Configure Products** button to open the Product Catalog. Refer to the *CPQ on Salesforce User Guide* for complete steps on configuring products, applying pricing, quantity, promotions and discounts, and finalizing the cart. After finalizing the cart, order line items are created for the order.
7. Click **Accept**. The following changes are made depending on whether or not you decided to automatically active the order:

- If **Auto Activate Order** = False
  - The status of Order and Order Line Items is set to “Pending.”
  - Asset Line Items are created in the “Pending” status.
  - If "Ready for Billing Date" is set, billing schedules are generated.
- If **Auto Activate Order** = True
  - The status of Order and Order Line Items is set to “Activated.”
  - Asset Line Items are created in the “Activated” status.
  - If "Ready for Billing Date" is set, billing schedules are generated.

Creating Orders from Quotes and Agreements

You can also create direct orders from the quote or agreement page, however in most cases you will want to follow the Auto Create Order workflow for generating orders in this way. Refer to the *CPQ* and *CLM User Guides* for these tasks and information on Asset-Based Ordering (ABO).

Cloning an Order

Clone an order when you want to save time to create a new order with existing data, order line items, and cart configuration (this is called a "deep clone").

> ⓘ Ensure that you or an administrator have added the Clone button to the Order page layout. Refer to the *Order Management on Salesforce Admin Guide* for more details.

To clone an order

1. Go to the Order Detail page of the order you want to clone.
2. Click **Clone Order With Line Items**. A new order is created. The following changes are made:
   - The status of the order and order line items are set to "Draft."
   - The fields Read for Activation Date and Ready for Billing date on the order header, and Asset Line Item on the order line item are reset.
   - Product Configurations are cloned along with corresponding cart and cart line items. Cart line items can then be configured and changed similar to drafting a new order.

> Asset-Based Ordering (ABO) Line Items cannot be cloned using this process. For more information ABO, refer to the *CPQ on Salesforce User Guide*.

Managing In-Flight Order Changes and Cancellation

An In-Flight Order is defined as any order that has been confirmed by the customer but has not yet reached fulfillment. In-Flight order changes can only be made to orders that are not automatically activated on confirmation. The two most common scenarios for In-Flight order changes are as follows:

- Amending an order: Amend an order when you need to add, cancel, or change order line items, change order quantities, pricings, and discounts, or modify order start/end date and/or change subscription dates. The previous version of the order is "Superseded" when the new order created by the amendment is accepted.
- Cancelling an order: Cancelling an order cancels the In-Flight order and its line items. After accepting cancellation of the order, the previous version of the order is "Superseded" and the new version is created with the "Cancelled" status.

You can use the Undo Amend Order and Undo Cancel Order actions at any time before either is accepted to revert all changes.

- In-Flight order changes and cancellation require you to enable certain Order System Properties. Refer to the *Order Management on Salesforce Administrator Guide* for steps.
- When In-Flight Order Change is enabled, an asset is only created on activation of its corresponding order line item.

Tracking Order Versions

Apttus maintains a version history when you work with new or existing orders. The following fields on the order header are populated when you amend or cancel an order:

- **Previous Version**: The previous version of the respective order before the order was amended or cancelled
- **Next Version**: The next version of the original order that has been amended or cancelled or is in the process of being amended or cancelled
- **Original Order Number**: The order number of the original order that was placed (before any amendments).
- **Version Number**: The version number that is associated with the respective order. The number increments by 1 each time the order is amended.

Automating In-Flight Order Changes

You can automate In-Flight order changes by creating Order Workflow Rulesets. Order Workflow Rulesets comprise specific Order Workflow Rules that execute in-flight order changes when certain criteria are met. The following are the main triggering events that execute these rules:

- A quote is accepted and converted to an order.
- An agreement is activated and converted to an order.
- A direct order or order amendment is accepted.
- The "Ready for Workflow" field is set to true on the order header for orders in "Pending", "In Fulfillment," or "Partially Fulfilled" status. (If the field is not present, add it to the Order page layout.)
- The execOrderWorkflow API is called directly to manually trigger one or more workflow rules.

For more information on APIs, refer to the *Apttus Order Management SOAP API Guide*.

Amending an Order

You can amend an order after it is accepted by the customer but before it has reached fulfillment. Amending an order creates a new version of the order to make and track changes and a reference to the previous version. The previous version of the order and order line items are "Superseded," once the work-in-progress (In Amendment) changes are confirmed on "Accept" of the "In Amendment" order.

You can make the following changes when you amend an In-Flight order:

- Change the start date or end date of subscription on one or more order line items that are in "Pending," "In Fulfillment," or "Partially Fulfilled" status.
- Make subscription date changes on the standalone item, bundles, and multiple charge line items.
- Cancel or add new line items, and change their quantities, pricing, and discounts.

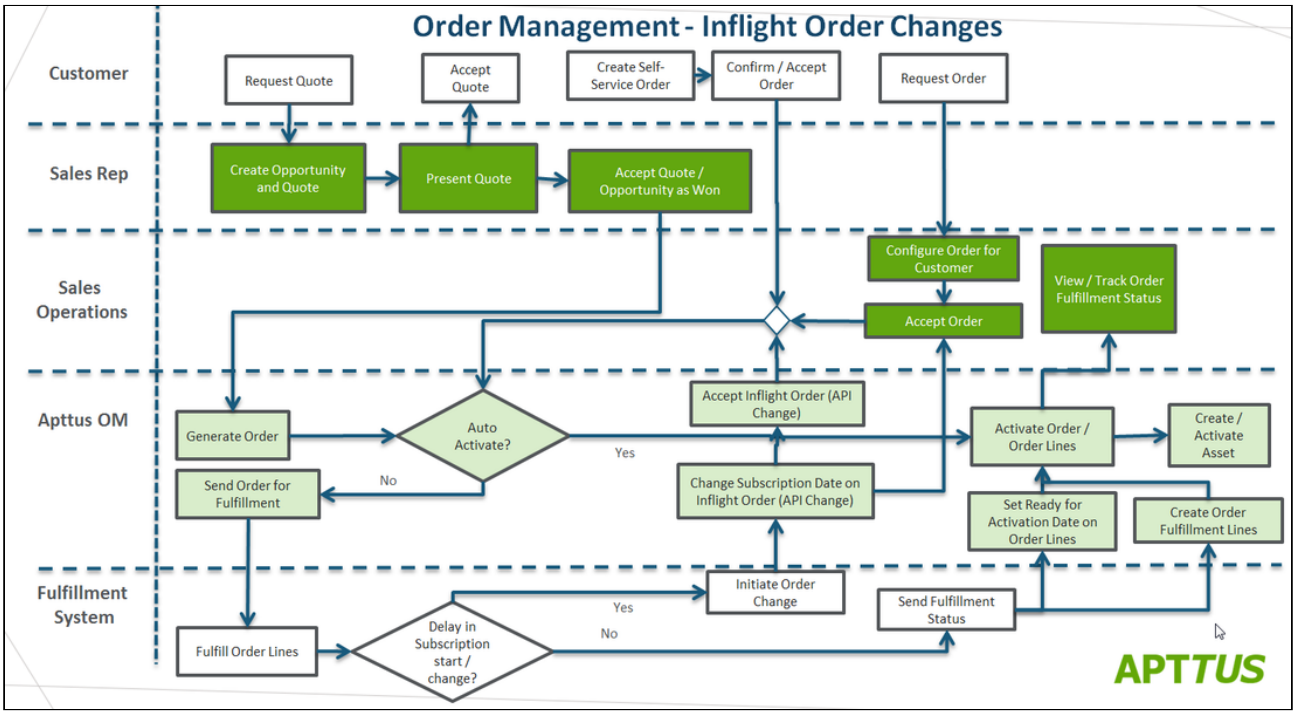
The change in subscription start and/or end date will recalculate the price for the line item or bundle after the changes are applied.

The changes to the order line items are also reflected in the corresponding assets. When In-Flight Order Changes is enabled, assets are only created on activation of the order line item.

Note: Any order configured directly or generated from a quote, agreement, or E-Commerce can be amended.

To change order line item quantities, the field "Is Quantity Modifiable" must enabled at the line item level for product configuration.

The following diagram demonstrates the In-Flight Order Changes workflow.



> If you do not see the Amend Order button then In-Flight Order changes may not have been configured for your product. You or an administrator must complete the proper configuration to continue. Refer to the topic Configuring In-Flight Order Changes and Cancellation in the *Order Management on Salesforce Administrator Guide*.

To amend an order

1. Navigate to the order from the quote, agreement, account, or Orders tab. The Order Detail page is displayed.
2. Verify that the order is in "Pending," "In Fulfillment," or "Partially Fulfilled" status and click **Amend Order**. The Cart page is displayed.
3. Make changes to the product configuration based on your requirements. To cancel any order line items:
   a. Select one or more order line items in the cart.
   b. Click the More menu under the Reprice/Finalize button.

   c. Click **Cancel Order Lines**. The cart is refreshed to display the remaining line items.
4. **Reprice** and **Finalize** the cart. Changes made to cart line items are copied to the order line items. Order Management creates a new version of the order in "In Amendment" status. The status for the previous version is changed to "Being Amended."
5. After approval of the the in-flight order changes, click **Accept** to confirm the amended order. The status of the new order is changed to "Pending." That status of the previous version is changed to "Superseded."
6. When all amendments are complete, activate the order.

- When a new line item is added to the cart associated with an amended order, the order line item status defaults to "Draft." When the order status is updated based on the combined status of order line items, the order is set to "Draft" status when there is at least one order line item in "Draft" status.
- Cancel Order Lines is not available from the cart menu if it is not configured properly in Config Settings. Refer to Configuring In-Flight Order Changes and Cancellation in the *Order Management on Salesforce Administrator Guide* for step-by-step information on configuring In-Flight order settings.

To undo an amend order

1. Navigate to the amended order.
2. To roll back the amendment and all order line item changes, click **Undo Amend Order**. The order is reverted to the previous version with its original status ("Pending," "In Fulfillment," or "Partially Fulfilled).

Cancelling an Order

You can cancel an order after it is accepted by the customer but before it is released to fulfillment systems. When you cancel an order, the status of the order and its line items is changed to "Pending Cancellation" and a new version is created. The previous order version status is set to "Being Cancelled." When you decide to cancel an order, you must accept the cancellation of the order to change the order and its line items from "Pending Cancellation" to "Cancelled". Any order amount that was rolled up to the Order Amount on the order header is subtracted from the total.

To cancel an order

1. Navigate to the order from the quote, agreement, account, or Orders tab. The Order Detail page is displayed.
2. Verify that the order is in "Pending" or "In Fulfillment" status and click **Cancel Order**. A new version of the order is created with the status "Pending Cancellation." The status for the previous version is changed to "Being Cancelled."
3. Click **Accept** to confirm order cancellation. The status of the cancelled order and its line items is changed to "Cancelled." That status of the previous version is changed to "Superseded."

To undo a cancelled order

1. Navigate to the cancelled order.
2. To roll back cancellation of the order, click **Undo Cancel Order**. The order is reverted to the previous version with its original status ("Pending" or "In Fulfillment"). The order amount is recalculated and displayed in the Order Amount field on the order header.

Creating Order Workflows to Automate In-Flight Order Changes

When you are working with a large number of orders and you must create rules for different business scenarios (for example, pro-rating subscriptions, or cancelling orders due to a delay in provisioning), you can use Order Workflows to automate in-flight changes to orders based on certain criteria.

Order Management allows you to automate in-flight order changes and cancellation using Order Workflow rulesets and rules. Creating Order Workflows comprises two main tasks. First, you define a **Workflow Ruleset** to provide the business and trigger context, and any criteria related to the trigger. You then create a **Workflow Rule** and **Workflow Rule Entries** within that ruleset to instruct the system which action or actions to execute based on further criteria.

> ⓘ You can only create one workflow rule per ruleset. Each workflow rule can contain one or more workflow rule entries.

When a workflow ruleset is triggered, the specified workflow rule executes based on the criteria that triggers one or more of its rule entries. For example, you could create a workflow rule that automatically amends the order to change the subscription date of one or more line items when the agreement is accepted.

Executing Order Workflow Rulesets

Order Workflow Rulesets trigger based on any of the following events:

- Automatic:
  - An order is created from a quote or agreement.
  - A partial order is created from a price agreement.
  - An order is accepted.
- Manual: Ready for Workflow is enabled and the order record is saved.

> ⓘ **After a workflow ruleset is executed, the Ready for Workflow flag is disabled.**

Perform the following tasks to set up a Workflow ruleset for automating in-flight order changes and cancellation.

-
  - To create an Order Workflow Ruleset
  - To define criteria for the Workflow Ruleset
  - To create an Order Workflow Rule
  - To create an Order Workflow Rule Entry
  - To define criteria for line item workflow rule entries
  - To define the input for line item workflow rule entries
  - Use Case: Automatic Subscription Rollover

To create an Order Workflow Ruleset

1. Click **All Tabs (⊞) > Order Workflow Rulesets > New** (in Salesforce Lightning, go to **App Launcher > Order Workflow Rulesets > New**). The New Order Workflow Ruleset page is displayed.

2. Enter the **Ruleset Name**.
3. Click the **Type** drop-down and select **API Execution**.
4. Enter a **Sequence** value (begins at "1"). This defines the sequence in which to execute the ruleset when an event triggers more than one ruleset.

   To avoid errors, specify a unique sequence value for every workflow ruleset.

5. Click the **Business Context** Type drop-down and select the context object (default is "Order").
6. Depending on your requirements, click the **Trigger Context Type** drop-down and select the appropriate trigger:

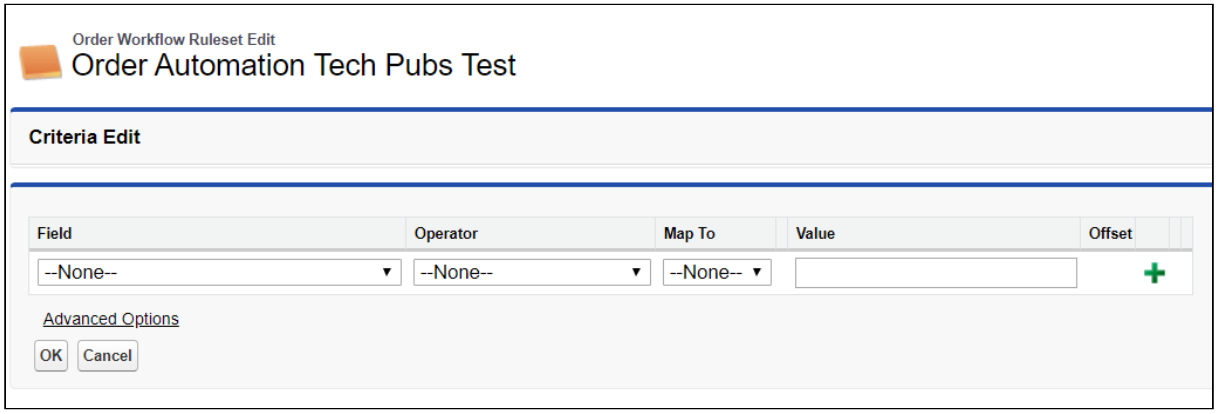
- **Order**
- **Order Fulfillment**

7. Depending on your requirements, add the appropriate **Trigger Event**(s) from the **Available** box to the **Chosen** box.
8. Select the **Active** checkbox.
9. Click **Save**. The ruleset is created.

To define criteria for the Workflow Ruleset

Perform the following task to define the triggering criteria for a workflow ruleset.

1. From the Workflow Ruleset Detail page, click **Criteria**. The Order Workflow Ruleset Edit page for Criteria Edit is displayed.
2. Click **Edit**. The Criteria Edit page is displayed.



3. Click the **Field** drop-down and select a field on the Order object.
4. Click the **Operator** drop-down and select an operator for the expression.
5. Click the **Map To** drop-down and select one of the following:
   - **None**: Evaluate the expression based only on the Field > Operator > Value defined.
   - **Function**: Date fields only. Specify days or months and the offset value.
   - **Order**: Map the field on the Order object to the value of another standard or custom field on the Order object.
6. Enter or select a **Value** for the expression.
7. Click the **Add Row** (+) icon to add another expression. Repeat steps 3 – 6 to define additional criteria.
8. Click **Advanced Options** to add filter logic if necessary (for example: "(1 OR 2) AND 3").
9. Click **OK** to save the criteria and return to the Workflow Ruleset Detail page.

To create an Order Workflow Rule

> You can create only one workflow rule per ruleset. Each workflow rule can contain one or more workflow rule entries.

1. Click **New Order Workflow Rule** from the Order Workflow Ruleset page. The New Order Workflow Rule page is displayed.
2. Enter a **Sequence** value (begins at "1").
3. Click the **Action** drop-down and select one of the following actions to be executed when the Workflow Ruleset is triggered:
   - **Amend Order**: Automatically amend the order. The order must be manually accepted after it is amended.
   - **Amend and Accept Order**: Automatically amend and accept the order.
   - **Cancel Order**: Automatically cancel the order. User must manually accept the order cancellation.
   - **Cancel and Accept Order**: Automatically cancel and accept the order cancellation.
4. (Optional) Enter a **Description**.
5. Click the lookup icon and select the ruleset to associate with the rule (automatically filled when the rule is created from a ruleset detail page.)
6. Click **Save.**

To create an Order Workflow Rule Entry

1. Click **New Order Workflow Rule Entry** from the Order Workflow Rule page. The New Order Workflow Rule Entry page is displayed.
2. Enter a **Sequence** value (begins at "1"). This defines the sequence in which to execute the workflow rule entries when the workflow ruleset is triggered.
3. Click the **Context Type** drop-down and select **Order Line Item**.
4. Click the **Action** drop-down and select one of the following actions to be executed when the rule entry criteria is fulfilled:
   - **Amend Order Items**: Amend the order line item specified by the rule entry criteria.
   - **Cancel Order Items**: Cancel the order line item specified by the rule entry criteria.
5. Click **Save**.

To define criteria for line item workflow rule entries

Perform the following task to define the criteria that determine which Order Line Items are amended or cancelled when the workflow rule is executed.

1. From the Order Workflow Rule Entry page, click **Item Criteria**. The Order Workflow Rule Entry Edit page for Criteria Edit is displayed.
2. Click **Edit**. The Criteria Edit page is displayed.

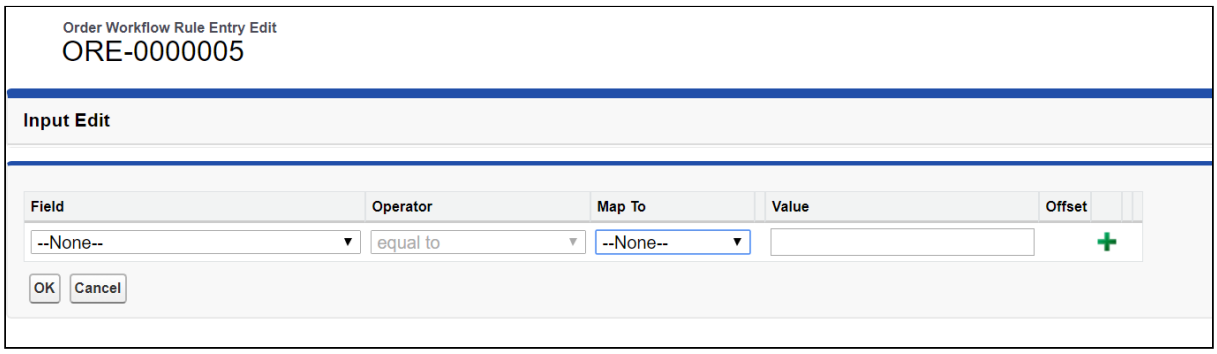
3. Click the **Field** drop-down and select a field on the Order Line Item object. Standard and custom fields on the Order Line Item object are available for selection.
4. Click the **Operator** drop-down and select an operator for the expression.
5. Click the **Map To** drop-down and select one of the following:
   - **None**: Evaluate the expression based only on the Field > Operator > Value defined.
   - **Function**: Date fields only. Specify days or months and the offset value.
   - **Order Line Item**: Map the field on the Order Line Item object to the value of another standard or custom field on the Order Line Item object.
6. Enter or select a **Value** for the expression.
7. Click the **Add Row** (+) icon. Repeat steps 3 – 6 to define additional criteria.
8. Click **Advanced Options** to enter filter logic (for example, "(1 OR 2) AND 3").
9. Click **OK** to save the Item Criteria and return to the Order Workflow Rule Entry page.

To define the input for line item workflow rule entries

Perform this task to define the action taken on one or more Order Line Items defined by the Item Criteria when the workflow rule is executed.

1. From the Order Workflow Rule Entry page, click **Item Input.** The Order Workflow Rule Entry Edit page for Input Edit is displayed.

2. Click **Edit**. The Input Edit page is displayed.



3. Click the **Field** drop-down and select a field on the Order Line Item object.
4. Click the **Operator** drop-down and select an operator for the expression.
5. Click the **Map To** drop-down and select one of the following:
   - **None**: Evaluate the expression based only on the Field > Operator > Value defined.
   - **Function**: Date fields only. Specify days or months and the offset value.
   - **Order Line Item**: Map the field on the Order Line Item object to the value of another standard or custom field on the Order Line Item object.
6. Enter or select a **Value** for the expression.
7. Click the **Add Row** (+) icon. Repeat steps 3 – 6 to add another input.
8. Click **Advanced Options** to enter filter logic (for example, "(1 OR 2) AND 3").
9. Click **OK** to save the Item Input and return to the Order Workflow Rule Entry page.

Use Case: Automatic Subscription Rollover

Description: This use case describes how to create a Workflow Ruleset to handle automatic subscription rollover for in-flight order changes.

Prerequisite: In-Flight Order Changes and Cancellation must be configured in Order Management Settings. Refer to the Order Management on SFDC Administrator Guide for more information.

You are tasked with modifying an in-flight order for subscription products. The product originally sold from January 1st to December 31st at a $1200 price point for a quantity of 10. However, fulfillment order the order is complete on January 31st. You need the subscription term to roll over, meaning that the order must be automatically modified to start on February 1st and end on January 31st the next year.

To create the Order Workflow Ruleset

1. Click **All Tabs (⊞) > Order Workflow Rulesets > New** (in Salesforce Lightning, go to **App Launcher > Order Workflow Rulesets > New**). The New Order Workflow Ruleset page is displayed.
2. Enter "Autoroll" as the **Ruleset Name**.
3. Click the **Type** drop-down and select **API Execution**.
4. Enter "1" for the **Sequence**.
5. From the the **Business Context** Type drop-down, select **Order**.
6. Click the **Trigger Context Type** drop-down and select **Order**.
7. Select the **Active** check box.
8. Click **Save**. The ruleset is created.

To create the Order Workflow Rule

1. Click **New Order Workflow Rule** from the Order Workflow Ruleset page. The New Order Workflow Rule page is displayed.
2. Enter "1" for the **Sequence**.
3. Click the **Action** drop-down and select **Amend and Accept Order**.
4. Enter "Auto Rollover Subscription on Fulfillment" in the **Description** field.
5. Click the lookup icon and select the **Autoroll** ruleset you created in the first task.
6. Click **Save.**

To create the Order Workflow Rule Entry and define criteria

1. Click **New Order Workflow Rule Entry** from the Order Workflow Rule page. The New Order Workflow Rule Entry page is displayed.
2. Enter "1" for the Sequence value.
3. Click the **Context Type** drop-down and select **Order Line Item**.
4. Click the **Action** drop-down and select **Amend Order Items**.
5. Click **Save**.
6. From the Order Workflow Rule Entry page, click **Item Criteria**. The Order Workflow Rule Entry Edit page for Criteria Edit is displayed.
7. Click **Edit**. The Criteria Edit page is displayed.
8. Click the **Field** drop-down and select **Status**.
9. Click the **Operator** drop-down and select **equal to**.
10. Enter "Fulfilled" for the **Value**.
11. Click **OK** to save the Item Criteria and return to the Order Workflow Rule Entry page.

To define input for the Order Workflow Rule Entry

For the input, perform the following tasks to shift the start date by a fixed number of days while keeping the end date the same.

1. From the Order Workflow Rule Entry page, click **Item Input.** The Order Workflow Rule Entry Edit page for Input Edit is displayed.
2. Click **Edit**. The Input Edit page is displayed.
3. Click the **Field** drop-down and select **Start Date**.
4. Click the **Operator** drop-down and select **equal to**.
5. Click the **Map To** drop-down and select **Function**.
6. Click the drop-down to the right of **Map To** and select **Today**.
7. Click the **Add Row** (+) icon to add another line.
8. On the new row, click the **Field** drop-down and select **End Date**.
9. Click the **Operator** drop-down and select **equal to**.
10. Leave the **Map To** value as **--None--** and leave the **Value** field blank.
11. Click **OK**.

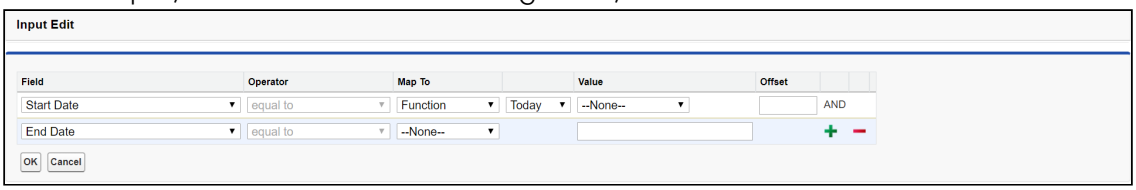
Result:

- The "Auto Roll" Order Workflow Ruleset is created.
- The corresponding rule and rule entry is created. Criteria and inputs are specified to ensure that when a subscription order line item is fulfilled, the start term is modified to automatically rollover the subscription term without changing the end date.

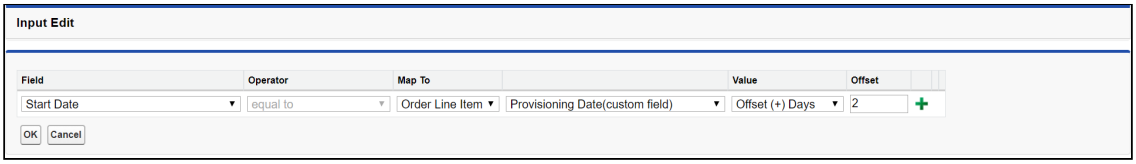
Sample Scenarios for Amending Orders Using Workflow Rules

Refer to the following sample scenarios for amending orders using workflow rules.

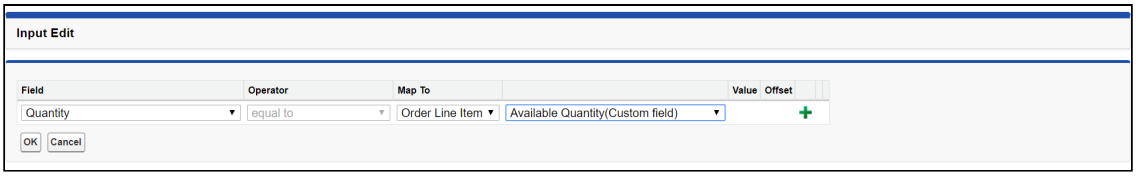
1. Auto Roll
   a. To shift the start date and end date of the order by a fixed number of days/ months while keeping the length of the subscription term same. In this case, just set the “Start Date” to a new date, set “End Date to Null” and do not modify the term using workflow rule entries.
   b. For example, Start Date = Today, End Date = Null.
   c. For example, Start Date = Provisioning Date, End Date = Null.



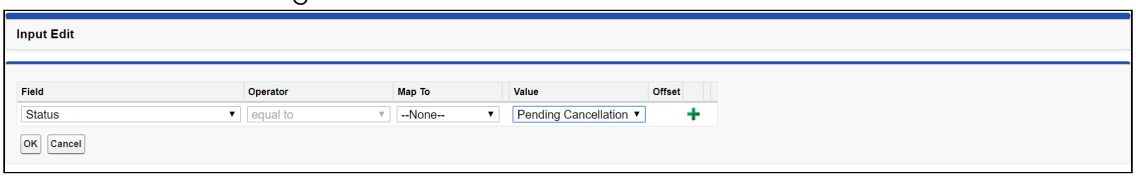
2. Pro Rata
    a. To move the start date of the subscription while keeping the end date unchanged. In this case, just specify the new start date and do not set End Date or Term.
    b. For example, Start Date = Provisioning Date + 2 Days.
    c. For example, Start Date = Provisioning Date, End Date = Previous End Date.



3. Quantity Changes
    a. To increase/decrease ordered quantity based on provisioning fulfillment inputs.
    b. For example, Quantity = InventoryAvailableQuantity.
    c. For example, Quantity = Provisioned Quantity.



4. Cancelling Order Lines
    a. To cancel order lines as inventory is not available for fulfillment. In this case, set the status to "Pending Cancellation".



Working With Customer Price Agreements

When business needs cannot be met by converting a quote or contract into a single order, you can use Order Management to create partial orders against a negotiated **Price Agreement**. In this case, when the quote is accepted or the contract is finalized, a **Contract Price List** is generated that is part of the Price Agreement. Users can then create partial orders to fulfill quantities at the negotiated price for product and service line items (on the quote or contract). Using Price Agreements, you can also track commitment compliance – how many line items were initially commited to the order initially versus how many have already been ordered or fulfilled – so that you can then take action based on that information.

Contract Price Lists are created from a quote or agreement where Intent = Price Agreement. You can then create partial orders from the line items stored in that Price List.

The Price List and Price List Item (PLI) objects store line item information from the quote or agreement in the following ways:

- For PLIs with the list price, the new net unit price is copied to contract price field of the new PLI.
- For PLIs with matrix pricing (recurring), the matrix is copied from original PLI to the new PLI.
- For PLIs with matrix pricing (usage), the matrix is copied from usage price tiers of the line item to the new PLI.

When a partial order is generated, product attributes and related line information is copied from the source line item (quote or agreement) to the target line item:

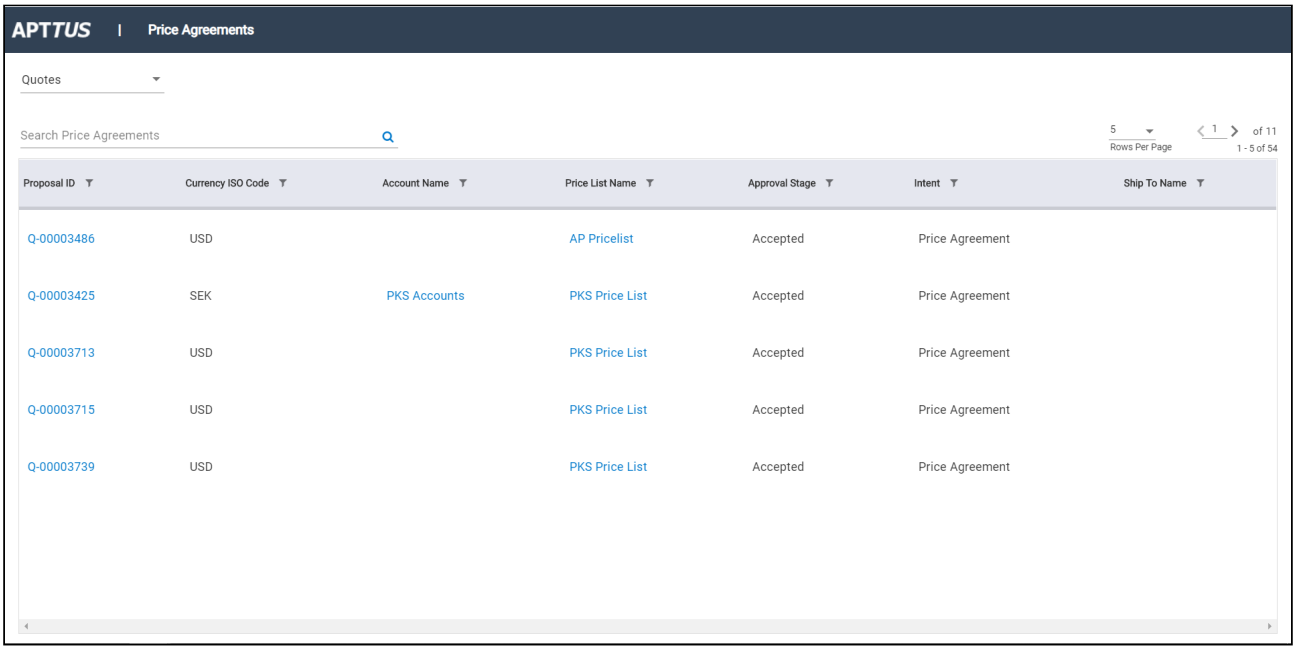
- Quote to order: When attributes are present on the quote line items, the order is created from the quote, and CopyBundleConfigurationFromSource = true, the attributes are copied to the order line items.
- Agreement to order: When attributes are present on the agreement line items, the order is created from the agreement, and CopyBundleConfigurationFromSource = true, the attributes are copied to the order line items.

Creating partial orders from Price Agreements allows you to:

- Select one or more line items and the subset of quantity
- Select items from one or multiple quotes or contracts
- Track committed quantity and ordered quantity
- Track commitment compliance

Navigating the Price Agreements User Interface

You can create partial orders using the Price Agreements UI. Click the **Price Agreement** tab to open the Price Agreements page.



The default view of the Price Agreements page displays a list of Quotes with Intent=Price Agreement. Click the drop-down from the upper left-hand corner of the page to switch between **Quotes** and **Agreements**.

You can perform the following actions on the Price Agreements page:

- Use the Search Price Agreements type ahead to filter the list of price agreements by keyword.
- Click the filter icon ( ) next to a column heading to filter the list of price agreements by that field.
- Click a column heading to sort the list of price agreements by that column.
- Click the drop-down in the upper right-hand corner to change the number of price agreements displayed in the list per page.
- Use the pagination controls in the upper right-hand corner to navigate the list of price agreements.

> ⓘ If you cannot locate the Price Agreements tab, then it is not configured for your org. Refer to the *Order Management on Salesforce Administrator Guide* for configuration steps. Administrators can also configure which columns are displayed in the list of price agreements.

Creating Partial Orders from Price Agreements

Perform the following task to create a partial order from a Price Agreement (quote or agreement).

To create a partial order

1. Click the **Price Agreement Tab**. The Price Agreements page is displayed.
2. Search for and click the **Proposal/Agreement ID**. The Price Agreement Detail page is displayed. The Price Agreement Line Items tab is displayed under the price agreement summary. Each Price List item displays, start date, end date, the negotiated quantity, remaining quantity to order, and the quantity to order.
3. Use the Search Products type ahead to filter the list of line items.
4. Enter the **Qty to Order** for a line item. After you enter any quantity, the **Create Partial Order** button is enabled.
5. Click **Create Partial Order**. The Create Sales Order page is displayed.
6. Enter values in the fields displayed on the page to create the partial order.
7. Click **Create Order**. The Price Agreement Detail page is displayed. The Order List is displayed with the newly-created partial order and any other partial orders made against this price agreement.
8. Click the Home icon (🏠) to return to the Price Agreements page. If required, repeat this task to create another partial order.

> ⓘ Refer to the *Order Management on Salesforce Administrator Guide* for steps to configure which fields are displayed in the partial order form, price agreement list, and order list.

Rolling Up Order Line Item Information to Quote and Agreement Line Items

Prerequisite: Order Line Item must be linked to Quote Line Item or Agreement Line Item.

Information is rolled up from the order line items to the quote or agreement line items when a partial order is created from the quote or agreement. For example: Whenever there is a change in the ordered line item for a given agreement line item, the Ordered Quantity is updated. If there is 1 ordered line item for a given agreement line item, the Ordered Quantity is 1. As per this feature:

- Quantity from the order line item is rolled up to the ordered Quantity on the proposal line item.
- Fulfilled quantity is rolled up from the order line item to the fulfilled quantity on the agreement line item when the fulfilled quantity is updated on the order line item
- Fulfillment status is updated on the agreement line item when the fulfilled quantity is updated on the order line item as stated below:

   a. Fulfilled Quantity = 0: Not Fulfilled
   b. Fulfilled Quantity < Quantity and > 0 : Partially Fulfilled
   c. Fulfilled Quantity > = Quantity: Fulfilled

- Order line items in all status except (Cancelled, Superseded, Being Amended, Being Cancelled) are rolled up.

Splitting an Order

This feature allows you to divide an existing order (parent order) into multiple orders (child orders) during the provisioning process. You can split any large order that was created from a Quote, Agreement, or Direct order that has not been amended.

Using this feature you can:

- Split the order on the initiation of acceptance based on customer needs.
- Split the order post creation and before activation using a select set of criteria.
- Split the order before it is activated and track the original order id on the split order.
- Split the order manually by selecting the order lines.
- Amend or cancel the orders that have been split.

Consider the following scenarios when deciding to split an order:

- You have a requirement for handling orders comprising different products.
- Splitting the order based on product availability and delivery timeline.
- Splitting the order to expedite the provisioning process.

Use one of the following methods to perform order split:

1. **Manual Split:** You can perform the manual split only through API. For more information, refer to the Splitting an Order topic in *Order Management on Salesforce Summer 2020 SOAP API Guide.*
2. **Auto Split on Accept:** To automate the order split using the criteria on order acceptance. You can perform split automation using one of the following criteria.
   a. Using Global Criteria
   b. Using Select workflow Level Criteria
3. **Order Workflow Ruleset**

Auto Split on Accept

You can automate the order split on acceptance using one of the following criteria.

- **Splitting the order on accepting using Global criteria:** This splits the order on Quote acceptance, Agreement activation, or order acceptance based on the global criteria defined in the Order System Properties.
- **Splitting the order on accepting using the selected workflow level criteria:** This split the specific order on Quote acceptance, Agreement activation, or Order acceptance based on the selection of order lines defined in the order workflow rule criteria.

Splitting the order on accepting using global criteria

To split the order using global criteria:

- Create an Order Workflow Ruleset and Order Workflow Rule. Refer to Creating Order Workflows to Automate In-Flight Order Changes for step by step instructions.

> **Note:**
>
> - When creating an Order Workflow Ruleset, ensure that **Record Updated** is chosen as a Trigger Event.
> - If the Order Workflow Rule Entry is not defined, the split order action is performed based on the Global criteria defined in the Custom settings > Order System Properties.

Usecase: **Using Global criteria**

Description: This use case describes how to create a Workflow Ruleset to handle the split order using global criteria.

A large manufacturing company that sells hardware and software products. Its backend process is handled in different fulfillment systems for the product lines. Sales representative quotes for 10 hardware items and 5 software items for one enterprise in a single quote. But, expecting to generate two individual orders for each Line of Business for fulfillment.

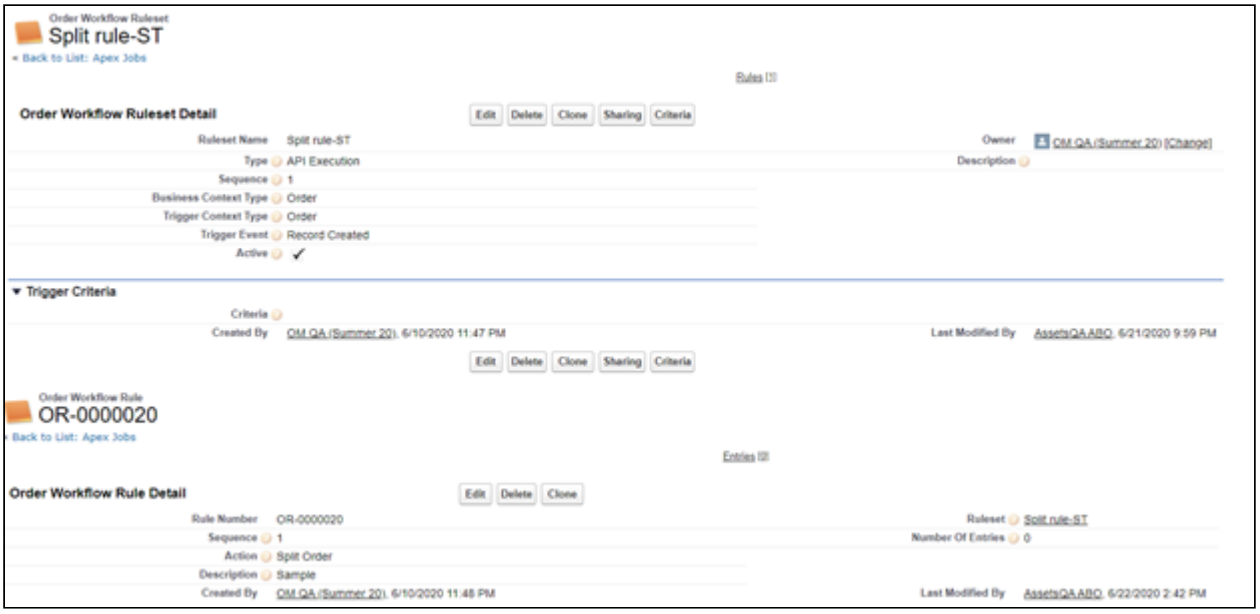
To create the Order Workflow Ruleset:

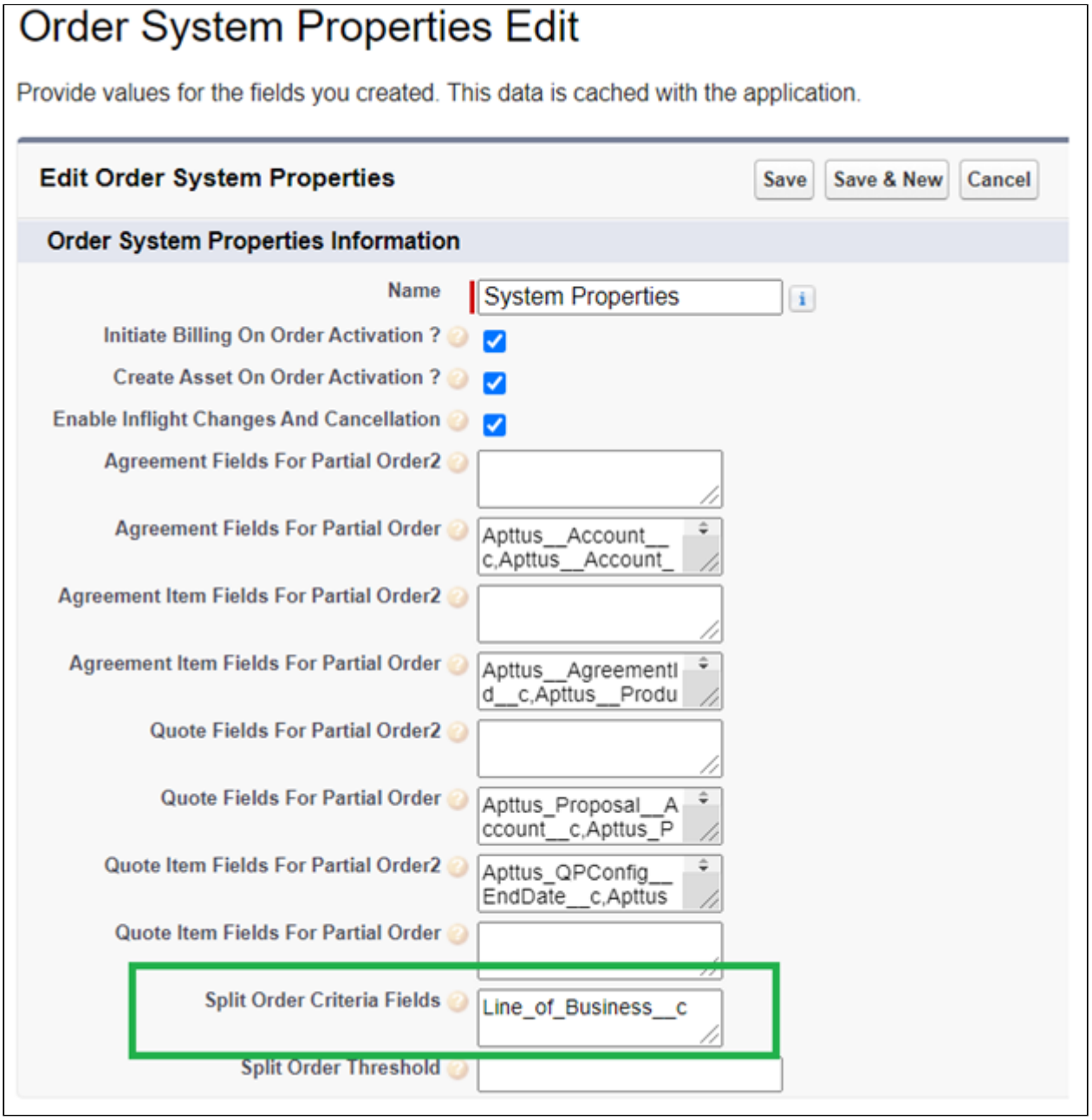
1. Click **All Tabs (+) > Order Workflow Rulesets > New** (in Salesforce Lightning, go to **App Launcher > Order Workflow Rulesets > New**). The New Order Workflow Ruleset page is displayed.
2. Enter "Split Rule" as the Ruleset Name.
3. Click the Type drop-down and select **API Execution**.
4. Enter "1" for the Sequence.
5. From the Business Context Type drop-down, select **Order**.
6. Click the Trigger Context Type drop-down and select **Order**.
7. Add the Order Updated Trigger Event(s) from the Available box to the Chosen box.
8. Select the Active checkbox.
9. Click Save. The ruleset is created.

To create the Order Workflow Rule:

1. Click New Order Workflow Rule from the Order Workflow Ruleset page. The New Order Workflow Rule page is displayed.
2. Enter "1" for the Sequence.
3. Click the Action drop-down and select Split Order.
4. Enter "Split order on accepting using <criteria name>" in the Description field.
5. Click the lookup icon and select the Split Rule ruleset you created in the first task.
6. Click Save.
7. Go to Order custom settings, go to **Setup > Custom Settings > Order System Properties**, and enter **Line_of_Business__c** in the Split Order Criteria fields.

Refer to the following screens for the sample setup for the given use case.





Result: The above setup triggers the parent order first and then splits into two new child orders. The parent order remains empty.

Splitting the order on accepting using the selected workflow level criteria

To split the order using select workflow level criteria:

- Create an Order Workflow Ruleset and Order Workflow Rule. Refer to Creating Order Workflows to Automate In-Flight Order Changes for step by step instructions.

Use Case: Splitting an order using the selected workflow level criteria

A large Hitech company sells perpetual licenses, software, and professional services. Their professional services deliverables are managed using a PSA tool. Sales representative quotes for 100 different licenses, 10 software, 3 professional services offerings in a single quote. On quote acceptance, the expectation is that the professional service items should carve out as a separate order for integration with the PSA system.

To create the Order Workflow Ruleset:

1. Click All Tabs (+) > Order Workflow Rulesets > New (in Salesforce Lightning, go to App Launcher > Order Workflow Rulesets > New). The New Order Workflow Ruleset page is displayed.
2. Enter "Split Rule" as the Ruleset Name.
3. Click the Type drop-down and select API Execution.
4. Enter "1" for the Sequence.
5. From the Business Context Type drop-down, select Order.
6. Click the Trigger Context Type drop-down and select Order.
7. Select the Active checkbox.
8. Click Save. The ruleset is created.

To create the Order Workflow Rule:

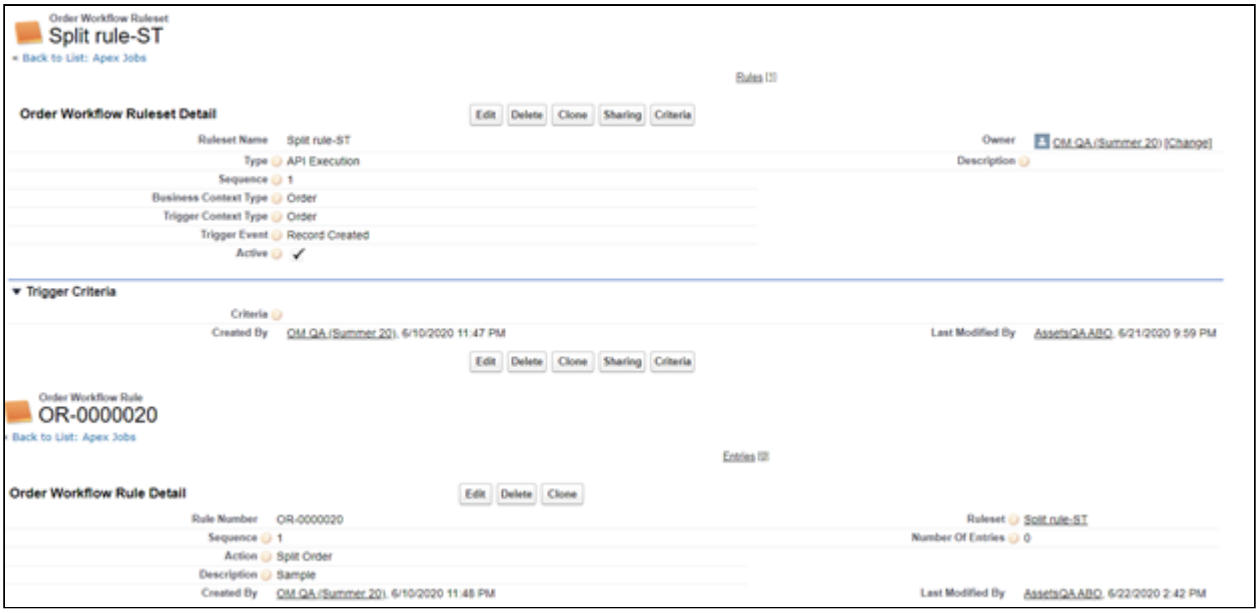
1. Click New Order Workflow Rule from the Order Workflow Ruleset page. The New Order Workflow Rule page is displayed.
2. Enter "1" for the Sequence.
3. Click the Action drop-down and select Split Order.
4. Enter "Split order on accepting using select workflow level criteria" in the Description field.
5. Click the lookup icon and select the Split Rule ruleset you created in the first task.
6. Click Save.

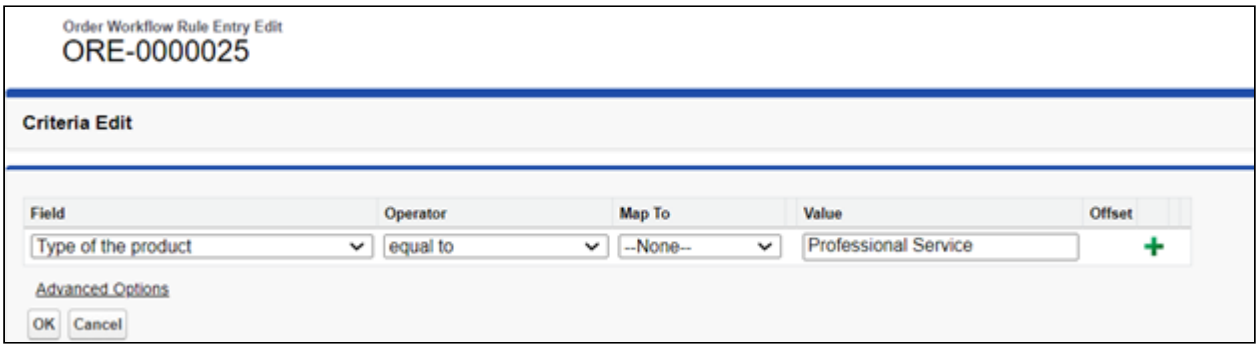
To create the Order Workflow Rule Entry and define criteria:

1. Click New Order Workflow Rule Entry from the Order Workflow Rule page. The New Order Workflow Rule Entry page is displayed.
2. Enter "1" for the Sequence value.
3. Click the Context Type drop-down and select Order Line Item.
4. Click **Save**.

5. From the Order Workflow Rule Entry page, click Item Criteria. The Order Workflow Rule Entry Edit page for Criteria Edit is displayed.
6. Click **Edit**. The Criteria Edit page is displayed.
7. Click the Field drop-down and select Type of Product.
8. Click the Operator drop-down and select **equal to**.
9. Click the Map To drop-down and select None.
10. Click the Value drop-down and select Professional Service.
11. Click **OK** to save the Item Criteria and return to the Order Workflow Rule Entry page.

Refer to the following screens for the sample setup for the given use case.





Result:

- The "Split Rule" Order Workflow Ruleset is created.
- The corresponding rule and rule entry is created. Criteria and inputs are specified to create a child order with professional service products. The license and software lines remain on the parent order.

Creating Order Workflows to Automate Split Order

The Order Workflow Rulesets enables the automatic triggering of the split action on quote acceptance, Agreement Activation (Agreement Flow), or Order acceptance (Direct Order Flow) for a specific selection of order lines as defined by the criteria on the workflow rule.

Perform the following tasks to set up a Workflow Rule for automating the split order process.

- To create an Order Workflow Rule for a Split Order
- To create an Order Workflow Rule Entry

To create an Order Workflow Rule for a Split Order

> You can create only one workflow rule per ruleset. Each workflow rule can contain one or more **Workflow Rule Entries**.

1. Create an Order Workflow Ruleset and define the criteria for the workflow ruleset. Refer to To create a new Order Workflow Ruleset and To define criteria for the Workflow Ruleset for step by step instructions.
2. Click **New Order Workflow Rule** from the Order Workflow Ruleset page. The New Order Workflow Rule page is displayed.
3. Enter a **Sequence** value (begins at "1").
4. Click the **Action** drop-down and select **Split Order**.
    - **Split Order**: Automatically split an order as per the flow defined in the order workflow rule.
5. Enter a **Description** (Optional).
6. Click the lookup icon and select the ruleset to associate with the rule (automatically filled when the rule is created from a ruleset detail page.)
7. Click **Save.**

To create an Order Workflow Rule Entry

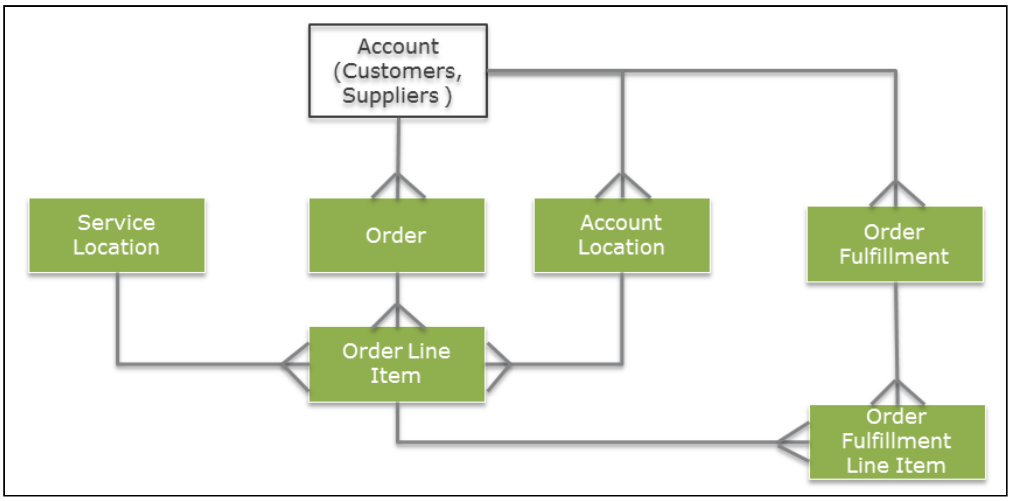
1. Click **New Order Workflow Rule Entry** from the Order Workflow Rule page. The New Order Workflow Rule Entry page is displayed.
2. Enter a **Sequence** value (begins at "1"). This defines the sequence in which to execute the workflow rule entries when the workflow ruleset is triggered.
3. Click the **Context Type** drop-down and select **Order Line Item**.
4. Click **Save**.

Working With Distributed Order Fulfillment

Order fulfillment refers to the order life cycle process from the time the order is confirmed by the customer to the time the order is activated. This includes the following key processes:

- Order release to fulfillment systems
- Order fulfillment status tracking with partial order fulfillment
- Order and Order Line Item activation

The following diagram provides an overview of the data Apttus captures to manage the order and order line items through fulfillment and activation.



The following objects are used in the distributed order fulfillment process to track and fulfill order line items from the beginning of order fulfillment to activation.

Data	Details
Account Location	Specifies the buyer's location where the products or services are installed. This is an optional field that can be used as part of an integration with fulfillment systems.
Service Location	Specifies the warehouse, plant, factor, fulfillment center, service center of the seller from which the products or services are delivered. This is an optional field that can be used as part of an integration with fulfillment systems.
Order Fulfillment	Order Fulfillment captures the details of the fulfillment coming from the fulfillment systems. A given fulfillment is for one or more orders for a given account for fulfillment completed on a specified date.

Data	Details
Order Fulfillment Line Item	Order Fulfillment Line item captures the quantity fulfilled against a given order line item. This is the information provided by the fulfillment systems and is used to track the total quantity fulfilled against the order line item. A given order line item can have multiple order fulfillment line items across one or more order fulfillment.

The following fields are used in the distributed order fulfillment process to track and fulfill order line items from the beginning of order fulfillment to activation.

Data	Details
Order Line Item > Ready for Fulfillment Date	Set this field on the parent order to apply it to all order line items associated with that order. (Note: Setting this date does not have any effect on Order Fulfillment Line Items or fulfillment status.
Order Line Item > Fulfilled Quantity	This field is automatically updated when the Order Fulfillment Line Item > Fulfilled Quantity for the given Order Line Item is saved.
Order Fulfillment > Account	The Account associated with one or more Order Fulfillment Line Items over one or more orders.
Order Fulfillment > Fulfillment Date	The date that corresponds to a single Order Fulfillment.
Order Fulfillment Line Item > Fulfilled Quantity	Set this field and save it to automatically updated the Fulfilled Quantity field value on the corresponding Order Line Item.
Order Fulfillment Line Item > Fulfillment In Progress?	Enable this flag on an Order Fulfillment Line Item to track stages of fulfillment for the corresponding Order Line Item. The Order Line Item Fulfilled Quantity and Status will not be changed regardless of fulfillment quantity as long is this flag is enabled.
Order Fulfillment Line Item > Status	Set this field to indicate the fulfillment status of an Order Fulfillment Line item. The Status is automatically updated to "Fulfilled" when the Fulfilled Quantity is greater than or equal to the Delta Quantity on the corresponding Order Line Item and "Fulfillment in Progress?" is disabled.

Releasing Orders to Fulfillment Systems

After an Order is activated, the order must be fulfilled by delivering the purchased products or services to the customer. This process is known as Order Fulfillment. Apttus Order Management supports distributed order fulfillment. This means that a single order can be fulfilled from different locations, warehouses, factories, or at different times in the fulfillment process. This is represented by the **Order Fulfillment** object that is associated with a specific **Account**.

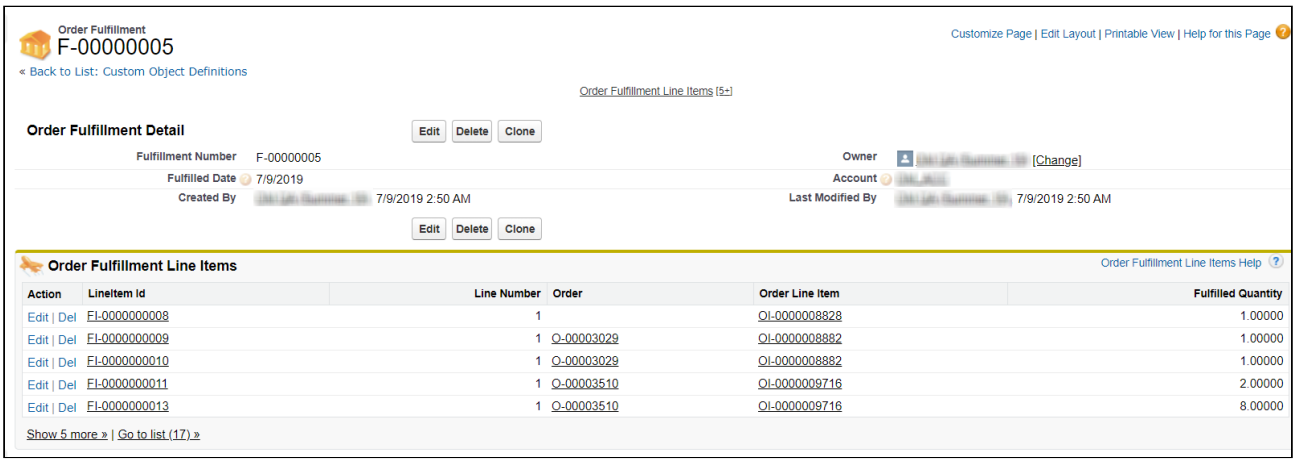
Similarly, a single Order Fulfillment can have multiple **Order Fulfillment Line Items** that are all part of the same order or from multiple orders. Fulfillment is tracked for one or more orders in this way through the Fulfillment Line Items.

You can use the field **Service Location** on the Order Line Item to track from which warehouse or fulfillment location the order will get fulfilled. Provide the value for Service Location manually on the Order Line Item or using workflow rules.

Working with Order Fulfillment

Order Fulfillments are created based on input from fulfillment systems, such as SAP ERP, Oracle ERP, and so on. Order Fulfillment and Order Fulfillment Line Items can be created manually, but in most cases these objects will be created through integrations with fulfillment and provisioning systems.

One Order Fulfillment can correspond to multiple orders for a given account. In this case, the Order Fulfillment captures all order line items to be fulfilled for a given customer on a particular date from the group.



It is important to understand that one Order Fulfillment is not related to an order in any way. The fields to consider on the Order Fulfillment object are the **Fulfilled Date** and the

Account associated with the fulfillment. Fulfillment of any actual orders is completed and tracked through the Order Fulfillment Line Items that comprise the particular Order Fulfillment.

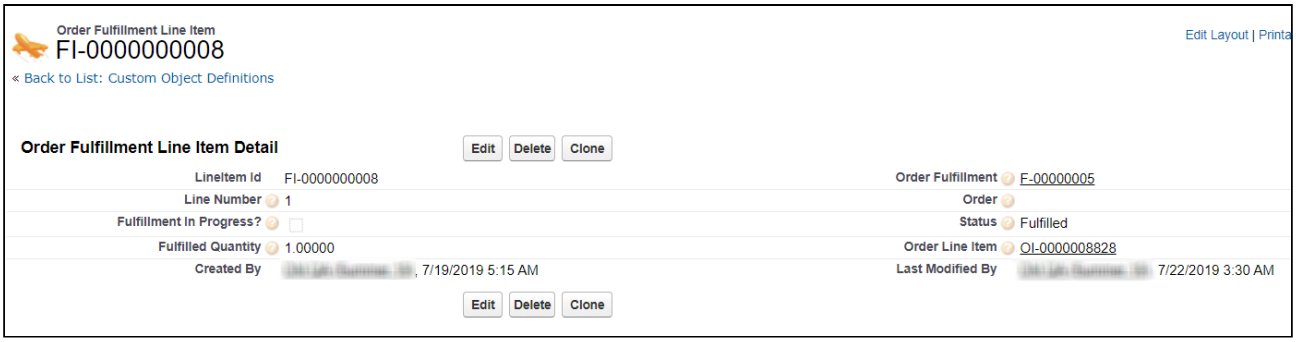
> All order line items from a given order do not need to be fulfilled for a given order fulfillment. Order can be fulfilled through multiple order fulfillments. Refer to Tracking Order Fulfillment.

Working with Order Fulfillment Line Items

Order Fulfillment Line Items are created based on the input from fulfillment systems as the quantities for Order Line Items are fulfilled. A given Order Fulfillment Line Item corresponds to a given Order Line Item. It represents the quantity fulfilled for a given Order Line Item on a given date.

One Order Line Item can have multiple Order Fulfillment Line items across multiple Order Fulfillments. The **Fulfilled Quantity** field on an Order Fulfillment Line Item is aggregated for a given line item and is updated on the **Fulfilled Quantity** field for the corresponding Order Line Item. When the Fulfilled Quantity of an Order Fulfillment Line Item is saved, the Fulfilled Quantity on the linked Order Line Item is updated and the status of the Order Line Item is updated to one of two statuses:

- If the Fulfilled Quantity is greater or equal to the Delta Quantity, the Order Line Item status is updated to "Activated."
- If the Fulfilled Quantity is greater than zero, and less than the Delta Quantity, the Order Line Item status is updated to "Partially Fulfilled."



Tracking Order Fulfillment

The Order fulfillment process calls for differing lifecycles for each of its order fulfillment line items depending on how the order is being fulfilled. As a result, Apttus Order Management provides a partial order fulfillment to control this process at different levels, such as:

- The entire order is activated and fulfilled as a whole.
- Some of the line items in the order are activated while other line items are still undergoing fulfillment.
- Individual line items are partially fulfilled at different times (for example, part of the quantity for a given order line item is fulfilled and tracked as partially fulfilled).

Scenarios for Partial Order Fulfillment:

- Company X receives an Order for 40 'platinum configuration' servers. The warehouse has only 30 units available. In this case, the Order is partially fulfilled with 30 units ready for delivery.
- A company producing Automobile spare parts has two production units for its products. It receives an Order for 10 different products. Since each product is manufactured at a different time in the production unit, the Order is fulfilled as and when the products complete the production process from start to finish.

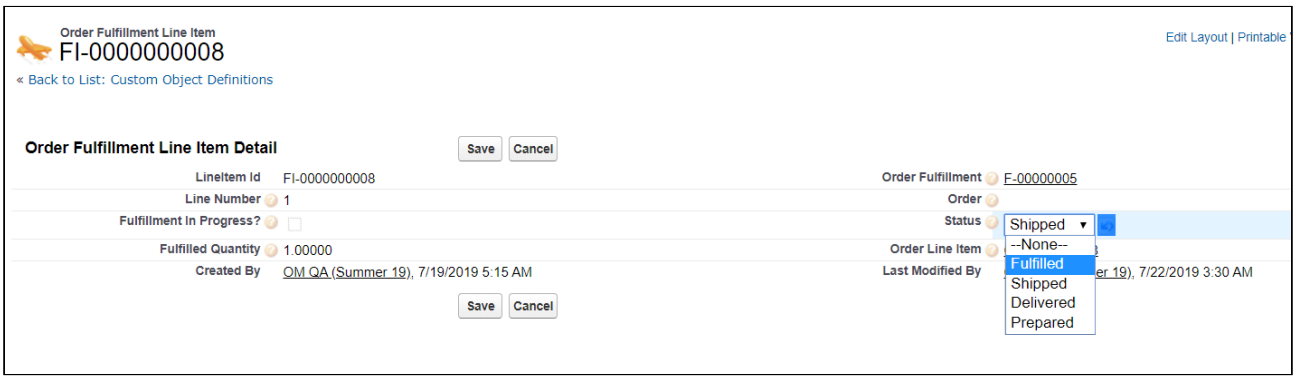
As fulfillment line items are created and fulfilled, order line items associated with one or more orders are fulfilled, eventually resulting in the activation of order line items and orders as part of the process.

Extending Order Fulfillment Tracking

For most cases, fulfillment of line item quantities followed by activation of the order line item is not sufficient for integration with fulfillment systems. When fulfillment scenarios require a series of intermediate steps in the fulfillment process you can enable the **Fulfillment in Progress?** field on the Order Fulfillment Line Item object. When this flag is enabled, any update to the Fulfilled Quantity on that fulfillment line item will not roll up to the corresponding order line item.

The **Status** field on the Fulfillment Order Line Item object designates the current stage of the fulfillment process. When all intermediate steps of the fulfillment process are complete,

disable the **Fulfillment in Progress?** flag. This sets the status of the Fulfillment Line Item to "Fulfilled," which then triggers an update in the status of the corresponding Order Line Item.



> ⓘ The Status field is not present on the Order Fulfillment Line Item page by default. An administrator must add it to the page layout to make any manual changes to status.

Using Service Locations to Track Partial Order Fulfillment

You can use the field **Service Location** on the Order Line Item object to track partial order fulfillment by shipping or service location. When you extend order fulfillment in this way, set the Service Location as part of the fulfillment process using workflow rules. For example, you may want to set a rule that help you to categorize order related to the USA under dollar ($) currency price lists and not under INR currency price lists.

> ⓘ The Service Location field is not present on the Order Line Item page by default. An administrator must add it to the page layout to make any manual changes to Service Location.

Activating an Order

Activating an order and its associated order line items indicates completion of the order fulfillment process and initiation of additional related downstream processes. Downstream processes include asset activation, billing initiation, revenue recognition, and so on.

Orders and Order Line Items are activated in the following ways:

- Auto Activate the order on generation from a quote/proposal: The **Auto Activate Order** flag is set to "true" on the quote/proposal. This generates an order with the status "Activated."
- Auto Activate the order on generation from an agreement: The **Auto Activate Order** flag is set to "true" on the agreement. This generates an order with the status "Activated."
- Set the Ready for Activation Date on the order: The **Ready for Activation Date** is specified on the order. This activates the order and its line items and initiates any downstream processes (if enabled), such as billing.
- Set the Ready for Activation Date on the order line item: The **Ready for Activation Date** is specified on an order line item. This activates the order line item but does not activate the corresponding order unless all of its line items are activated.
- Auto Activate the order on confirmation (Accept action) of a direct order: The **Auto Activate Order?** field is set to "true" on the order header.
- Activate order and order line items based on the line item fulfilled quantity:
    - Once the **Fulfilled Quantity** for a given line item is greater than or equal to the **Delta Quantity**, the Order Line Item status is set to "Fulfilled."
    - Once all the Order Line Items are "Activated", the corresponding order is also marked as "Activated."

Providing a Legal Entity for Downstream Processes

The **Legal Entity** field on the Order object can be specified to enable billing and revenue recognition for related legal entities. When an order line item is activated and an asset is created, the Legal entity value specified in the order header is copied to the **Legal Entity** field for the corresponding Asset Line Item.

When a quote or agreement has a value for Legal Entity, that value is automatically copied when the quote or agreement is converted to an order. When you place a direct order or the field is not present in the quote or agreement record, you must specify a Legal Entity to enable any downstream processes.

Billing for an Order

Apttus billing and invoicing can be initiated for the orders either before or after activation of the order. When billing is initiated depends on Order Management settings.

To create billing schedules on activation of an order

1. Go to **Setup** > **Custom Settings** > **Order System Properties**
2. Click **Manage**.
3. Click **Edit**.
4. Click the check box next to **Initiate Billing On Order Activation?** and click **Save**.

To create billing schedules manually

Prerequisite: The custom setting **Initiate Billing On Order Activation?** must be disabled.

1. Go to the order record and set the **Ready for Billing Date** field.
2. Click **Save**.

> ⓘ If the **Ready for Billing Date** is set to a date before the order is activated, the billing schedules are created when the order becomes active.

Use Case: Billing for Standalone Recurring product

Tier1 system sells 'SecureDevice' ($100/unit) which is billed monthly for a contract period of one year. The contract is in effect from 04/20/2016. The customer wants an invoice on 15th of every month.

Steps:

1. Add a product 'SecureDevice' with **List Price** as *$100* and **Price Type** as *Recurring*.
2. Under the Tax and Billing tab on PLI, set the **Billing Rule** as *Bill in Advance* and **Billing Frequency** as *Monthly*.
3. Create a new Billing Preference and set **Billing Cycle Start** to *Billing Day of the month.*
4. Set *Billing Day of the month* to 15th of the month.
5. Create a Quote/Proposal. Set **Start Date** as 04/20/2016 and **End Date** as 04/19/2017.
6. Add the product to your cart and **Finalize**.
7. **Present** the proposal and **Accept** it after the reviews.
8. Order and Asset are created when the proposal is accepted. Activate the order.

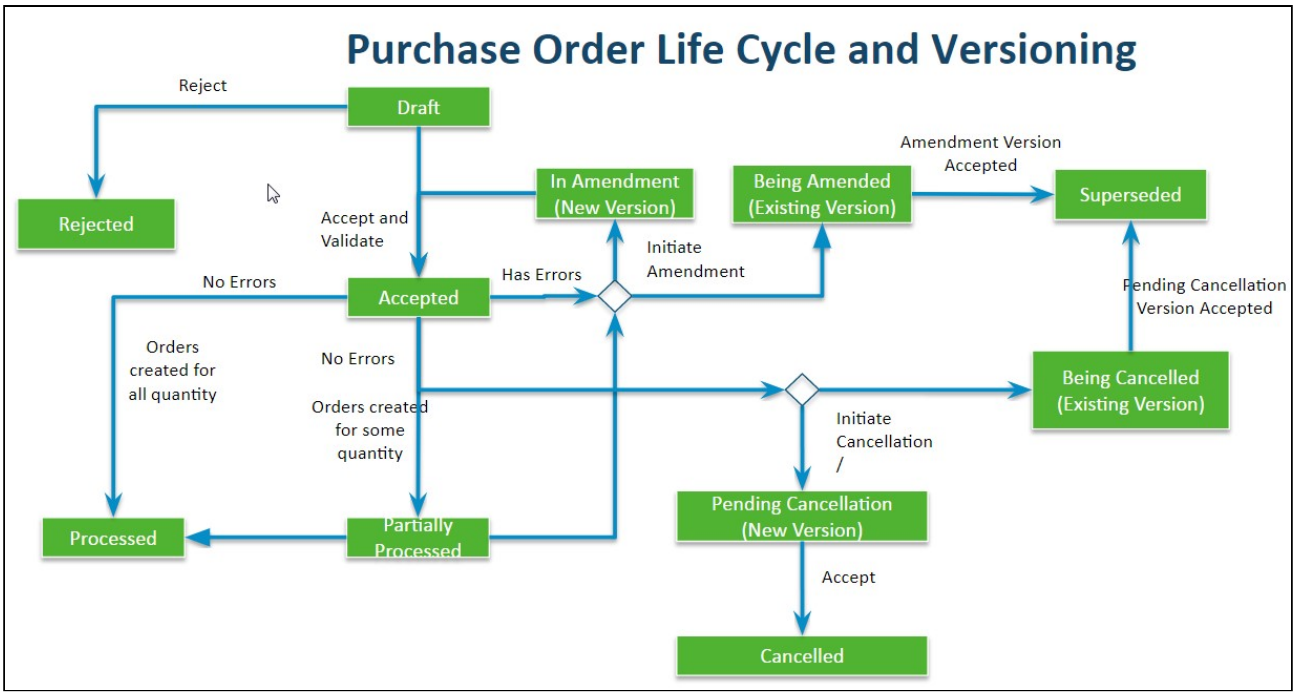
Resulting Billing Schedules

Period Start Date	Period End Date	Ready for Invoice Date	Amount
4/20/2016	5/14/2016	4/20/2016	$83.33
5/15/2016	6/14/2016	5/15/2016	$100
6/15/2016	7/14/2016	6/15/2016	$100

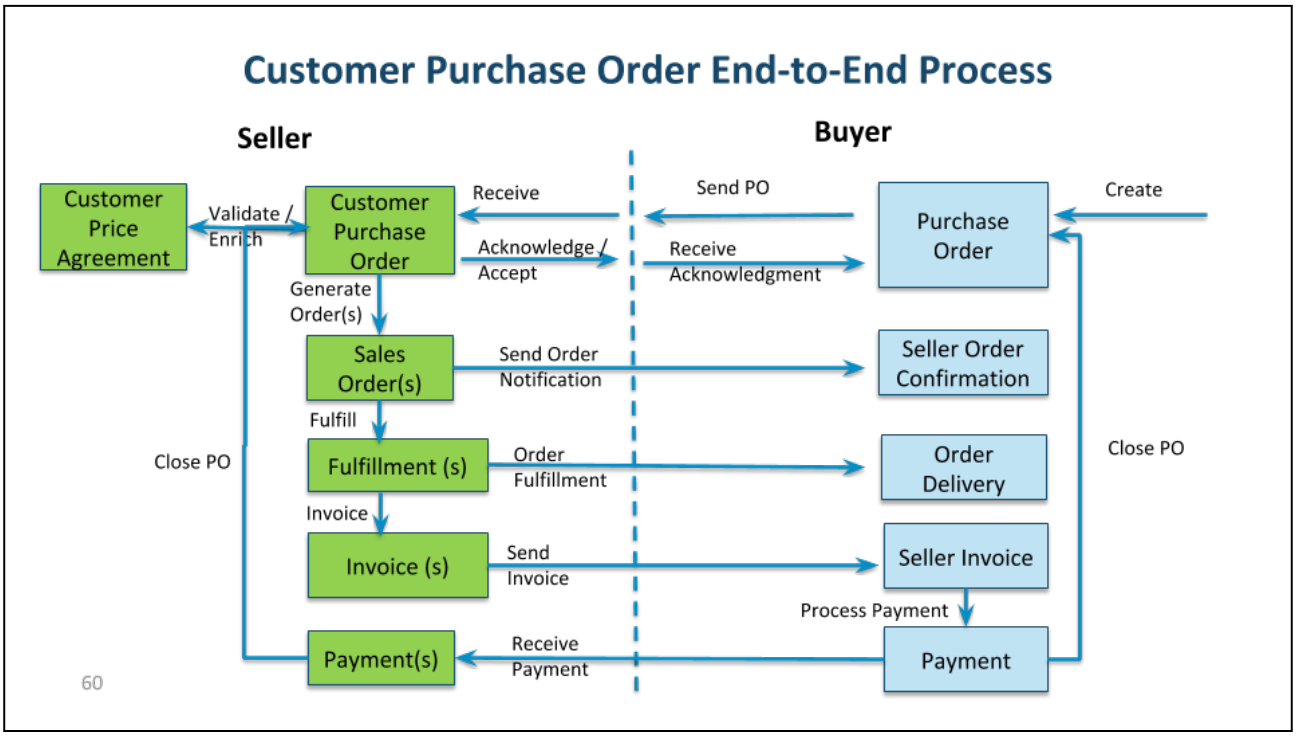
Working with Customer Purchase Orders

In Order Management, a **Customer Purchase Order** is a customer document (usually PDF or email) that represents the initial offer of negotiated types, quantities, and prices for products or services. Customer Purchase Orders can be created by sales users or administrators as sales orders for long-term contracts.

The following diagram illustrates the customer purchase order lifecycle.



When a customer places a purchase order, they submit a document that references the quote or agreement line item numbers from an associated customer price agreement. When Apttus Order Management receives that purchase order the purchase order is validated against the line items and negotiated pricing in the price agreement, and any data enrichment rules are applied. The user must then mitigate any of the existing validation errors or warnings and accept the purchase order. Sales orders can then be placed against the purchase order and follow the same lifecycle from that point as with any other order processed by Apttus Order Management.



Refer to the following table for the tasks described in the portion of the user guide.

Function	Description
Capture Customer Purchase Orders	• Capture raw purchase orders from customers • Add PDF or Email as attachments to Customer POs
Manage Validation / Enrichment Rules	• Create and manage rules to validate, match, and enrich PO • Add PO items against customer's existing contracts, Quotes, and other master data
Validate PO against Quotes/Contracts	• Validate or enrich PO and PO items against customer's existing contracts, Quotes, or other master data
PO Exception or Issue Logs	• Capture errors or issues identified during data validation and enrichment of customer PO and PO Items
View PO header and line item validation issues	• View data validation issues for header and line items

Function	Description
Fix data validation and match issues	• Allow users to fix data validation or matching issues • Maintain version history of changes for audit trail
Create or Generate Sales Orders	• Convert the PO to a single sales order • Auto convert PO to multiple sales orders based on split criteria • Create partial orders from a PO
Amend or Cancel Inflight Customer PO	• Amend in-flight PO to add a line, change lines, cancel lines • Cancel in-flight PO
Track orders and fulfillment against PO	• Track ordered quantity by PO items • Track fulfilled quantity by PO items

Understanding Customer Purchase Order Status

As a Customer Purchase Order moves through the order lifecycle, the purchase order and its line items are assigned a status. The following table describes the mapping between Customer Purchase Order (PO) and PO Item statuses:

PO Status	PO Item Status
Draft	• All items are in "Draft" status.
Accepted	• All items are in "Accepted" status and the Customer PO is not in "In Amendment" status. • One or more items are in "Accepted" status while remaining items are in "Cancelled" status and Customer PO is not in "In Amendment" status. • PO Items and header may have errors.

PO Status	PO Item Status
Partially Processed	• Any one item is in "Partially Processed"status and Customer PO is not in "In Amendment" status. • One or more items are in "Processed" status while remaining items are in "Accepted" status and Customer PO is not in "In Amendment" status.
Processed	• All PO items are in "Processed" status. • One or more items are in "Processed" status while remaining items are in "Cancelled" status.
Rejected	• All PO Items are in "Rejected" status. • PO Items and header may have errors.
In Amendment	• PO Is explicitly amended and the current version is the latest one. • PO items can be in "Draft," "In Amendment," "Pending Cancellation," "Cancelled," "Partially Processed," or "Processed" statuses. • PO Items and header may have errors.
Pending Cancellation	• All PO Items are in "Pending Cancellation" status.
Cancelled	• All PO Items are in "Cancelled" status.
Being Cancelled	• Next version exists in "Pending Cancellation" status.
Being Amended	• Next Version exists in "In Amendment" status.
Superseded	• Next version in "Accepted" status.

Managing CPO Validation and Enrichment Rules

When you create a Customer Purchase Order in Order Management, you need to ensure that the Customer Purchase Order (CPO) you create contains Purchase Order Items (PO Items) that match line items coming from one or more referenced quotes, contracts, or price

agreements. To accomplish this, you must configure Validation rules that validate data entered in the CPO against existing data in the price agreement, as well as Data Enrichment rules that automatically enter data for specific fields onto the CPO rather than having to do it manually. When these rules trigger, they display errors or warnings that can be correct by the user creating the CPO before any orders are created.

You can create CPO Validation and Enrichment rules using the Purchase Order Admin (PO Admin) user interface. The PO Admin UI provides a step-by-step wizard that allows you to create a **Data Enrichment and Validation Ruleset** which contains one or more **Data Validation** and/or **Data Enrichment** rules that are triggered based on specified criteria when you are creating your CPO. You can then review and activate these rules prior to accepting the CPO.

Refer to Setting Up Purchase Order Admin in the *Order Management on Salesforce Administrator Guide* for step-by-step instructions for setting up the PO Admin angular UI.

Use the PO Admin UI to create rulesets containing the following rule types:

- **Data Enrichment Rules**: Use these rules to enrich the data in your CPO. For example, the PO item account must be the same as the Proposal Line Item or Source Object Account. You can define the data enrichment rule in order to input this data whenever you create a customer purchase order instead of feeding this data manually.
- **Data Validation Rules**: Use these rules to set up data validations for purchase orders or its items so that whenever you specify the values for quantity or fulfilled quantity, a data validation rule is triggered to ensure that the values fall within the specified limits. You can have two types of validations:
    - Warning: This type of data validation rule allows you to continue the operation despite the system warning. However, it warns you to take precaution while creating sales orders.
    - Error: This type of data validation rule does not allow to bypass the error and stops the operation until you mitigate the error before continue creating the sales orders.

Perform the following tasks in this section to create and manage CPO Validation and Enrichment rules.

Creating Data Enrichment and Validation Rules

You can use the Purchase Order Admin (PO Admin) user interface to create and manage Data Enrichment and Validation rules for your Customer Purchase Orders.

A **Data Enrichment and Validation Ruleset** defines the target object (Customer PO or Customer PO Item), the source object (Quote/Proposal, Contract, Order, Proposal Line Item, Agreement Line Item, or Order Line Item), the criteria to be applied to the target and source objects, and any additional filter logic. When criteria for a ruleset is fulfilled, the **Enrichment and Validation Rules** defined in the ruleset are triggered and any actions specified in its rules are executed. Perform the following task to create a Data Enrichment and Validation Ruleset and its rules.

> Do not click your browsers "Back" button when using the PO Admin.

- To create Enrichment and Validation rules using the PO Admin
- Use Case: Creating a Data Enrichment/Validation Ruleset for a Customer Purchase Order

To create Enrichment and Validation rules using the PO Admin

1. Navigate to the **PO Admin** tab. The Customer Purchase Order Admin page is displayed.

   > If you cannot find the PO Admin tab, your administrator must add the tab in Salesforce. Refer to the *Order Management on Salesforce Administrator Guide* for steps.

2. From the upper right-hand corner in the header, click **Create New Rule**. The Data Enrichment and Validation Setup wizard is displayed.
3. Enter a **Ruleset Name** and the **Sequence**, which indicates the order in which this ruleset will be validated on confirmation of the customer purchase order (starts at "1").
4. From the **Target Object To Validate** drop-down, select either **Customer Purchase Order** or **Customer PO Item**.
5. If you selected Customer PO Item as the object to validate, click the **Target Object Parent** drop-down and select **Customer Purchase Order**.
6. From the **Source Data Object** drop-down, select the source object on the price agreement you want to match to the customer purchase order.
7. Click **Next** to display the Specify Target Data Filter Criteria screen.

8. Click **Add** and define filter criteria to be applied to the target Customer PO or PO Item:
    a. Select a **Field** on the Target object (for example, Status).
    b. Select an **Operator**.
    c. Enter or select a **Value** for the field (for example, Draft. In this case, whenever the system finds a status in Draft, the rule is triggered for the Customer Purchase Order).
9. Click **Add** to add another filter to the target and repeat step 8. You can remove a defined filter criteria by clicking the Delete icon ( ).
10. Add any Filter Logic as needed.
11. Click **Next** to display the Specify Source Data Filter Criteria screen.
12. Click **Add** and define the filter criteria to match a field on the source object (Quote/Proposal, Proposal Line Item, Agreement, Agreement Line Item, Order, or Order Line Item) with a field on the Customer PO or PO Item, or to validate a field on the source object against a field on the Customer PO or Customer PO Item:
    a. Select a **Field** on the Source object (for example, Proposal Line Item).
    b. Select an **Operator**.
    c. To match a field on the source object with a field on the Customer PO, click the **Value Type** drop-down and select **Field Value**. Then select one or more values from the **Target Field** drop-down.
    d. To validate a field on the source object against a field on the Customer PO, click the **Value Type** drop-down and select **Constant**. Enter the value for the field on the target object.
13. Click **Add** to add another filter to the target and repeat step 12. You can remove a defined filter criteria by clicking the Delete icon ( ).
14. Click **Save and Close** to save the ruleset or click **Next** to display the Specify Enrichment Rules screen.
15. Define an Enrichment rule to set a value on the Customer PO or PO Item to a value from the selected Source Object field:
    a. Select the **Target Object Field** (for example, Contract Item Number).
    b. Select the **Source Object Field** (for example, Record ID).
    c. Click the toggle to make the field a required field on the Customer Purchase Order or PO Item.
    d. Enter the **Message** to be displayed to the user when an error occurs (for example, when either the target or source object field is not found).
16. Click **Add** to add another rule to the ruleset and repeat Step 15. You can remove a rule by click the Delete icon ( ).
17. Click **Save and Close** to save the ruleset or click **Next** to display the Specify Validation Rules screen.

18. Define a Validation rule to validate a value in the CPO or PO Item against the master data in the Source object field:
    a. Select the **Target Object Field** (for example, Quantity).
    b. Select the **Match Operator** (for example, "less than or equal to").
    c. Select the **Source Object Field** (for example, Quantity (2)).
    d. Select the **Error Type** to be triggered when the rule does not evaluate to true: Warning or Error.
    e. Enter the **Message** to display to the user when an error occurs.
19. Click **Add** to add another rule to the ruleset and repeat step 18. You can remove a rule by click the Delete icon ( ).
20. Click **Next** to display the Review screen. You can review the entire Data and Enrichment Validation Rule Setup on this page. If you need to make any changes, click **Previous** to return to the appropriate step.
21. Click **Done** to save the ruleset and return to the PO Admin page.
22. Click **Activate** to activate the ruleset.

> When a rule is executed and any errors are found, they are recorded in the log.

Use Case: Creating a Data Enrichment/Validation Ruleset for a Customer Purchase Order

Description: The requirement for this Customer Purchase Order is to create and apply Data Enrichment and Validation rules as part of a ruleset that enriches the PO using data on the quote line item. The ruleset then validates that the quantity entered in the PO is the same as the quantity on the quote line item. This use case is an example of a ruleset that can be applied to multiple purchase orders with varying combinations of products and services.

In the following example, an administrator or sales user/customer support representative with appropriate permissions creates a Data Enrichment/Validation Ruleset and the Enrichment and Validation rules that comprise it.

Prerequisites:

- The Customer Purchase Order and Purchase Order Admin user interfaces must be configured.
- Data Enrichment/Validation Ruleset seed data must be configured.

> Refer to *Order Management on SFDC Administrator Guide* for configuration steps.

To create a Data Enrichment/Validation Ruleset to enrich the Customer Purchase Order and validate order quantities against quote line items

1. From the upper right-hand corner in the header, click **Create New Rule**. The Data Enrichment and Validation Setup wizard is displayed.
2. Enter "Enrich PO and validate quantity" as the Ruleset Name.
3. Enter "1" in the **Sequence** field.
4. Click the **Target Object To Validate** drop-down and select **Customer PO Item**.
5. Click the **Target Object Parent** drop-down and select **Customer Purchase Order**.
6. Click the **Source Data Object** drop-down and select **Proposal Line Item**.
7. Enter the **Description** "Enrich PO and validate quantity against QLI."
8. Click **Next** to display the Specify Target Data Filter Criteria screen.
9. Click **Add** and define the following filter criteria:
    a. Click the **Field** drop-down and select the field "Status."
    b. Click the **Operator** drop-down and select "in." Value type is "Constant."
    c. Click the **Value** drop-down and select "In Amendment" and "Draft."
10. Click **Next** to display the Specify Source Data Filter Criteria screen.
11. Click **Add** and define the following filter criteria:
    a. Click the **Field** drop-down and select the field "Line Item Id."
    b. Click the **Operator** drop-down and select "equal to." Value type is "Field Value."

   c. Click the **Value** drop-down and select "Quote Line Item."
12. Click **Next** to display the Specify Enrichment Rules screen.
13. Click **Add** and define an Enrichment rule to set the value for the Product field on the Customer PO Item to the value of the same field on the Proposal Line Item:
    a. Click the **Target Object Field** drop-down and select **Product**.
    b. Click the **Source Object Field** and select **Product**.
14. Click **Add** and define an Enrichment rule to set the value for the Ship To field on the Customer PO Item to the value of the same field on the Proposal Line Item:
    a. Click the **Target Object Field** drop-down and select **Ship To**.
    b. Click the **Source Object Field** and select **Ship To**.
    c. Click the toggle to make **Ship To** a required field on the Customer Purchase Order or PO Item.
    d. Enter the **Message** "Ship To not found at the source on the line item" (this displays a message to the user when the Ship To field has no value on the corresponding quote line item).
15. Click **Add** and define an Enrichment rule to set the value for the **Net Price** field on the Customer PO Item to the value of the same field on the Proposal Line Item:
    a. Click the **Target Object Field** drop-down and select **Net Price**.
    b. Click the **Source Object Field** and select **Net Price**.
16. Click **Next** to display the Specify Validation Rules screen.
17. Define a Validation rule to validate **Quantity** of the PO Item against master data in the Proposal Line Item record:
    a. Click the **Target Object Field** drop-down and select **Quantity**.
    b. Click the **Match Operator** drop-down and select **equal to**.
    c. Click the **Source Object** Field drop-down and select **Quantity (2)**.
    d. Click the **Error Type** drop-down and select **Error**.
    e. In the **Message** field, enter "PO quantity does not match the value on the proposal line item."
18. Click **Next** to display the Review screen.
19. Click **Done** to save the ruleset and return to the PO Admin page.
20. Click **Activate** to activate the ruleset.

Result: A Data Enrichment/Validation Ruleset is created and activated. Any custom purchase orders created in the system from this point forward will use the enrichment and validation rules defined by the ruleset.

Next Step: Create a Customer Purchase Order and Purchase Order items for an accepted quote.

Mitigating Data Validation Issues

Apttus Order Management displays the data validation messages based on the data validation rules that you set while configuring a ruleset.

For example,

If you have set proposal item quantity cannot be greater than PO Item quantity, then after the data validation rule is executed, Apttus Order Management maps the target and source object fields for quantity.

Depending on the error type that you configured in the data validation rule, a warning or an error is shown that you need to act upon in order to complete the operation.

Customer PO Issue Logs

For the In-Amendment orders, when you click **Validate Customer PO** Apttus Order Management generates all the PO related issue details in the **Customer PO Issue Logs**.

Error or Warning fields

Based on the below fields you can identify errors with your Customer PO and its items.

- Validation Errors
- Number Of Errors
- Number Of Warnings

To fix the errors, you can go to each ruleset using the issue log and amend the CPO that are in Draft and In-Amendment states.

Creating Customer Purchase Orders

Before you can create a sales order from a purchase order, you must capture the details of the customer purchase order by creating it manually using the Order Management UI.

> ⓘ Customer Purchase Orders can be created automatically through integration, as long as the Purchase Order data comes to Apttus in a machine-readable format (for example, XML or JSON). For assistance with this procedure, contact Apttus Professional Services.

To create a customer purchase order

1. Navigate to the **Customer Purchase Orders** tab. The Customer Purchase Order page is displayed.
2. Click **New Purchase Order**. The New Purchase Order page is displayed.
3. Enter the following fields in the Order Basic section of the page: **Previous Version, Account, Account Name, PO Date, Price List**, and **Price List Name**. Enter the **Quote Number/Proposal number** associated with the Price Agreement. Enter any additional fields as required.
4. Enter the following fields in the Order Customer section of the page: **Bill To, Ship To,** and **Contact**. Enter their corresponding reference fields to store the IDs. The **Account Reference** field is the record Id received from the external system.
5. Add the **Requested Delivery Date**.
6. Click **Save & Add Products**. The **PO Number** is autogenerated. The **Status** of the Customer Purchase Order is set to *Draft.*
7. Once the purchase order is created, click **Add/Edit Line Items** to modify existing purchase order line items or add new line items to the customer purchase order. Click **Save** to save line items.

> You can **Add/Edit Line Items** only when the purchase order is in "Draft" or "In Amendment" status.

Accepting Customer Purchase Orders

After you create a Customer Purchase Order, the status of PO and its line items changes to "Draft."

To accept a Customer PO

1. Navigate to the **Customer Purchase Orders** tab. The Customer Purchase Order page is displayed.
2. Use the type ahead to filter the list of purchase orders. Click the **PO Number** for the purchase order you want to view. The Customer Purchase Order detail page is displayed.
3. Click **Accept**. The status of the CPO and its PO Items changes to **Accepted**.

> ⓘ The Accept button is only enabled when the PO is in "Draft," "In Amendment," or "Pending Cancellation" status **and** at least one line item has been added.

4. Click the info (ⓘ) icon to view a list of warnings and errors. Click **Correct Problem** to take mitigating action for any errors.
5. After you have corrected all errors, you can create a sales order.

Amending Customer Purchase Orders

Amend a Customer Purchase Order to create a new version after accepting a purchase order and correcting any errors. You can only amend a CPO when the status is in "Accepted" or "Partially Processed."

To amend a Customer PO

1. Navigate to the **Customer Purchase Orders** tab. The Customer Purchase Orders page is displayed.
2. Use the type ahead to filter the list of purchase orders. Click the **PO Number** for the purchase order you want to view. The Customer Purchase Order detail page is displayed.
3. Click **Amend**. A confirmation dialog is displayed.
4. Click **Yes** to confirm the amend action:
   - A new version of the CPO is created and assigned the "In Amendment" status.
   - The **Accept Button** and **Undo Amend** buttons are enabled.
   - The status of the previous version is updated to "Being Amended."
5. Add, Edit, or Delete a PO Item as required. For details, refer to Creating Customer Purchase Orders. You can add a new PO item or edit the quantity of an existing PO item as appropriate.
6. Click **Accept**. The status of the PO and its line items changes to "Accepted." The status of previous version changes to "Superseded."

Reverting Changes to an Amended Customer Purchase Order

You can revert the changes that you made to the CPO by using **Undo Amend Order** action. You can only revert Customer POs in the "In Amendment" status.

To undo an amendment to a Customer PO

1. From the Customer Purchase details, click **Undo Amend Order**:
    - Any changes made to Customer PO and its line items are rolled back to the previous version.
    - The status of previous Customer PO and its line items changes to "Accepted."

Cancelling Customer Purchase Orders

You can cancel a Customer PO when it is in the "Accepted" status.

To cancel a Customer PO

1. Navigate to the **Customer Purchase Orders** tab. The Customer Purchase Order page is displayed.
2. Use the type ahead to filter the list of purchase orders. Click the **PO Number** for the purchase order you want to view. The Customer Purchase Order detail page is displayed.
3. Click **Cancel Order**
    - The **Status** of PO and its line items changes to **Pending Cancellation**.
    - The **Accept** button is enabled.
    - A new version of the PO is created.
    - The status of previous version changes to **Being Cancelled** and the status of PO items remains **Accepted**.
4. Click **Accept**. The status of the Customer PO and its line items changes to "Cancelled." The status of previous version changes to "Superseded."

Reverting Cancelled Customer Purchase Orders

You can revert cancelling a Customer PO and its items by using the **Undo Cancel Order** action.

To undo cancel a customer PO

1. From the Customer Purchase Order details page, click **Undo Cancel Order.**

- The changes made to customer PO and its line items are rolled back to the old version.
- The status of the previous Customer PO and its line items changes to "Accepted."

Creating Sales Orders from a Customer Purchase Order

After a Customer Purchase Order is accepted and validated, you can create one or more sales orders from the purchase order.

You can create a sales order from the purchase order in one of three ways as follows:

- Create Single Order: Create a single order for the whole customer PO.
- Split Multi Orders: Select one or more "split criteria" to create multiple orders organized into groups based on the criteria (for example, group PO Line Items by Contract Number).
- Create Partial Order: Create a partial order from one or more PO Items.

> For more information about creating orders from Customer Purchase Orders APIs, refer to the *Order Management on Salesforce SOAP API Guide*.

Creating a Single Order

After an order is accepted and any errors or warnings are resolved, you can create a single order from the entire Customer PO.

> Do not click **Cancel** to go back to the previous page as this will cancel the entire Customer Purchase Order. Click the Home icon ( ) icon to return to the list of purchase orders.

To create a single order from the CPO

1. Navigate to the **Customer Purchase Order** tab.
2. Use the type ahead to filter the list of purchase orders and click a **PO Number** to view the purchase order details.
3. From the header in the upper right-hand corner of the page, click **Create Sales Order** and select **Create Single Order**:

- The Order is generated under **Sales Orders** tab.
- The status of the sales order generated from customer purchase order is updated to "Pending."
- The status of the purchase order is updated to "Processed."

Creating Multiple Sales Orders

After an order is accepted and any errors or warnings are resolved, you can split the Customer PO into multiple orders based on split criteria. For example, PO Line Number, Quantity, Net Price, End Date, and so on.

> Do not click **Cancel** to go back to the previous page as this will cancel the entire Customer Purchase Order. Click the Home icon ( ) icon to return to the list of purchase orders.

To create a split order from the Customer PO

1. Navigate to the **Customer Purchase Order** tab.
2. Use the type ahead to filter the list of purchase orders and click a **PO Number** to view the purchase order details.
3. From the header in the upper right-hand corner of the page, click **Create Sales Order** and select **Split Multi Orders**. The Create Multiple Sales Order screen is displayed.
4. Click the drop-down to select one or more **Split Criteria** to group purchase order items into multiple orders.
5. Scroll to the bottom of the page to view a message indicating how many orders will be created.
6. Click **Create Sales Order**. Multiple sales orders are created based on Split Criteria:
    - Each order is generated under the Sales Orders tab.
    - The status of each sales order generated from the customer purchase order is updated to "Pending."
    - The status of the purchase order is updated to "Processed."

Creating Partial Orders

After an order is accepted and any errors or warnings are resolved, you can create a Partial Order from the Customer Purchase Order. Create a partial order when you only need to order a partial quantity of the PO Items listed on the Customer PO.

Do not click **Cancel** to go back to the previous page as this will cancel the entire Customer Purchase Order. Click the Home icon ( ) icon to return to the list of purchase orders.

To create a partial order from the Customer PO

1. Navigate to the **Customer Purchase Order** tab.
2. Use the type ahead to filter the list of purchase orders and click a **PO Number** to view the purchase order details.
3. From the header in the upper right-hand corner of the page, click **Create Sales Order** and select **Create Partial Order**. The Create Partial Order screen is displayed.
4. Use the type ahead to filter the list of PO Items.
5. For each PO Item, enter a **Process Qty** for the partial order. Process Qty must be less than or equal to the difference between Remaining Qty and Processed Qty (also displayed in the list).
6. Click **Create Sales Order**. The Partial Order is created:
    - Each order is generated under the Sales Orders tab.
    - The status of each sales order generated from the customer purchase order is updated to "Pending."
    - The status of the purchase order is updated to "Partially Processed."

You cannot create a partial order from a Customer PO if the status of the order is "Partially Processed."

Intelligent Order Assistant (Max for OM)

Intelligent Order Assistant is a conversational interface developed using Apttus Max bot technology. It is available embedded within web applications as well as on mobile devices through channels Slack, Skype etc. This can help in various order management functions including view orders, view order details, create order, amend order, cancel order among others. There are standard conversational flows available which can be modified at the project level.

Max functionality is not currently supported in this release.

Order Management (Out-Of-the-Box) Max Flow

When User types, Hello or Hi, Max respond with the following options:

- View Orders
- View Order Details
- Create New Order
- Amend Order
- Cancel Order
- Clone Order

A user can choose an option to start the relevant conversation.

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

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