APTTUS

Order Management on Salesforce Winter 2017 User Guide

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Apttus Order Management pulls revenue data, like billing schedules and order terms, directly from your quotes and contracts to ensure correct invoices every time. Easily orchestrate any type of product configuration, solution bundle or change order validating changes against contracts helping you eliminate errors and improve efficiency.

This guide takes you through,

- Order Management in the Quote-to-Cash process
- Order Lifecycle and Status
- Order Creation
- Distributed Order Fulfillment

Obtaining the Software package

- You can obtain a license for Apttus Order Management from your Apttus sales representative.
- To get the Apttus Order Management package, confirm access to Apttus Customer Success Portal.
- Ensure you can access the CPQ tab within Apttus Customer Success Portal.
- Select **Apttus Order Management** and click **Get it Now**.

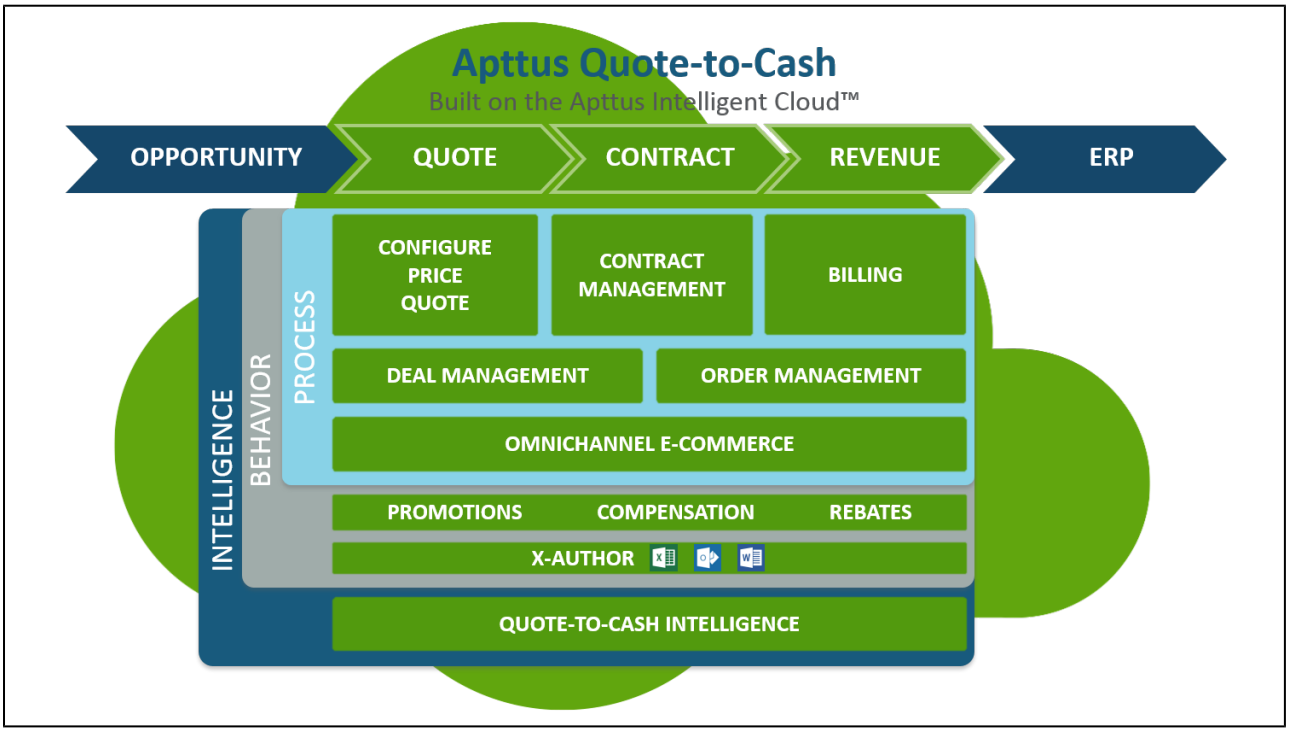
Order Management in the Quote-to-Cash process

Apttus provides comprehensive Quote-to-Cash solutions built on the Salesforce platform, designed to increase customer satisfaction and boost revenue. Unlike other systems requiring extensive coding and integration, Apttus Quote-to-Cash provides an integrated view of all customers, quotes, and contracts that you can use to drive revenue growth, reduce errors and delays, and improve customer loyalty. Apttus has enabled over 300 customers and 500,000 users improve time to revenue, prevent revenue leakage, reduce risks and decrease DSO (Days Sales Outstanding).

This end-to-end solution covers your entire sales life cycle, from product and service configuration, pricing, quoting, negotiating, signing the contract, managing invoicing, billing, orders, and revenue recognition.

The Apttus Quote-to-Cash process makes closing deals a highly effective and integrated process that you can manage across geographies and on the cloud.

The following image illustrates the Quote-to-Cash flow.



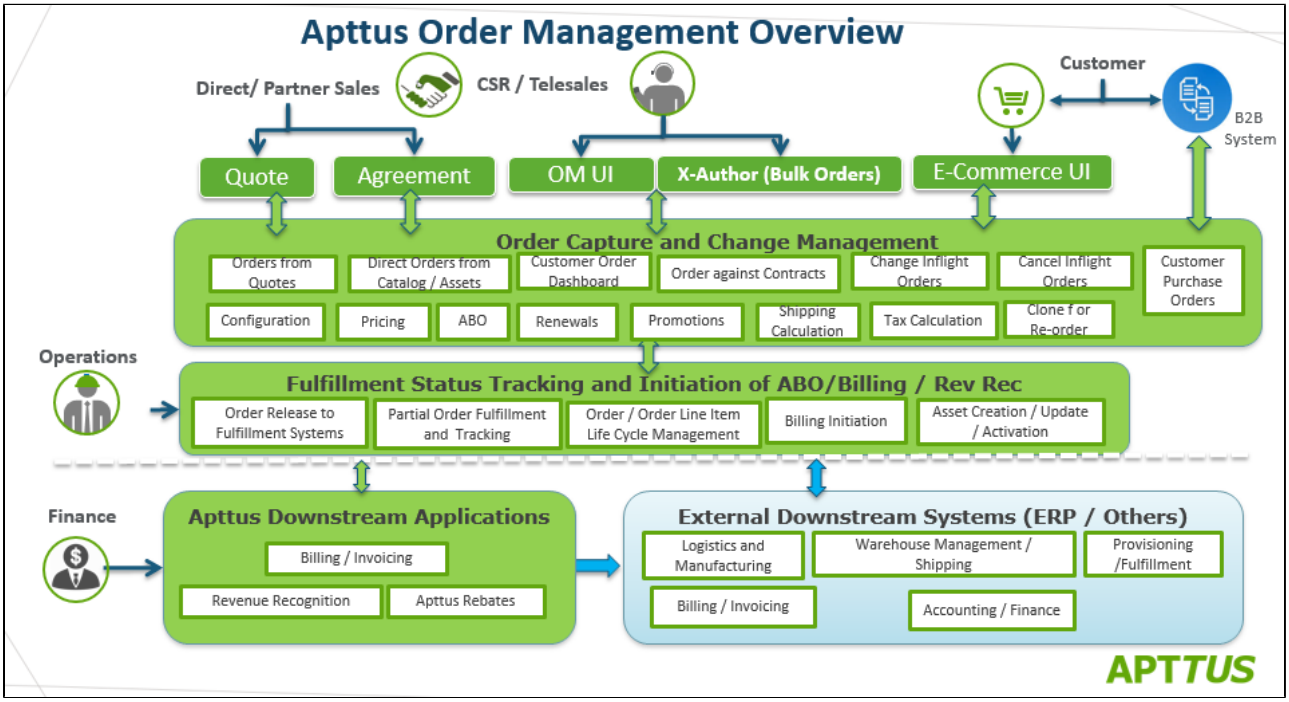
With applications in the Apttus Quote-to-Cash suite, you can

- Increase your revenue and margins
- Reduce variations in your business process
- Increase speed and agility of every transaction
- Measure cycle time of a deal from opportunity through revenue recognition
- Track your actual revenue against the targets you set
- Identify and mitigate risky deals
- Increase up-selling and cross-selling opportunities
- Define, configure, and execute product promotions, sales incentives, and customer rebates

Overview

For service providers, Order Management is the focal point of customer interactions where delivery has been promised. Extending the Configure Price Quote capabilities, when buyers request a quote and accept it after a round of negotiation, the next step is placing an Order.

Following diagram shows the Order Lifecycle and its interaction with different entities, at various stages in the Omni-channel sales process.



At present, Apttus supports Order creation through Direct & Partner Sales and E-commerce interface. From the Order Management interface, Customer Support Reps can create Orders on behalf of the customers.

Installing the Order Management Package

Salesforce provides a simple wizard-led installation process for all Apttus packages.

Install the Apttus Order Management package from the Apttus Customer Portal > **Install Center** > **Integrations**:

For more information on the Order Management packages, refer to *Order Management Winter 2017 Release Notes for Salesforce Platform*.

> **Note**
>
> You must have Apttus-provided login credentials to the Customer Success Portal to be able to download packages.

To install the Apttus Order Management package

1. Go to the **Install Center** within the *Apttus Customer Portal.*
2. Under My packages, select **Order Management** and click **Install Now**.

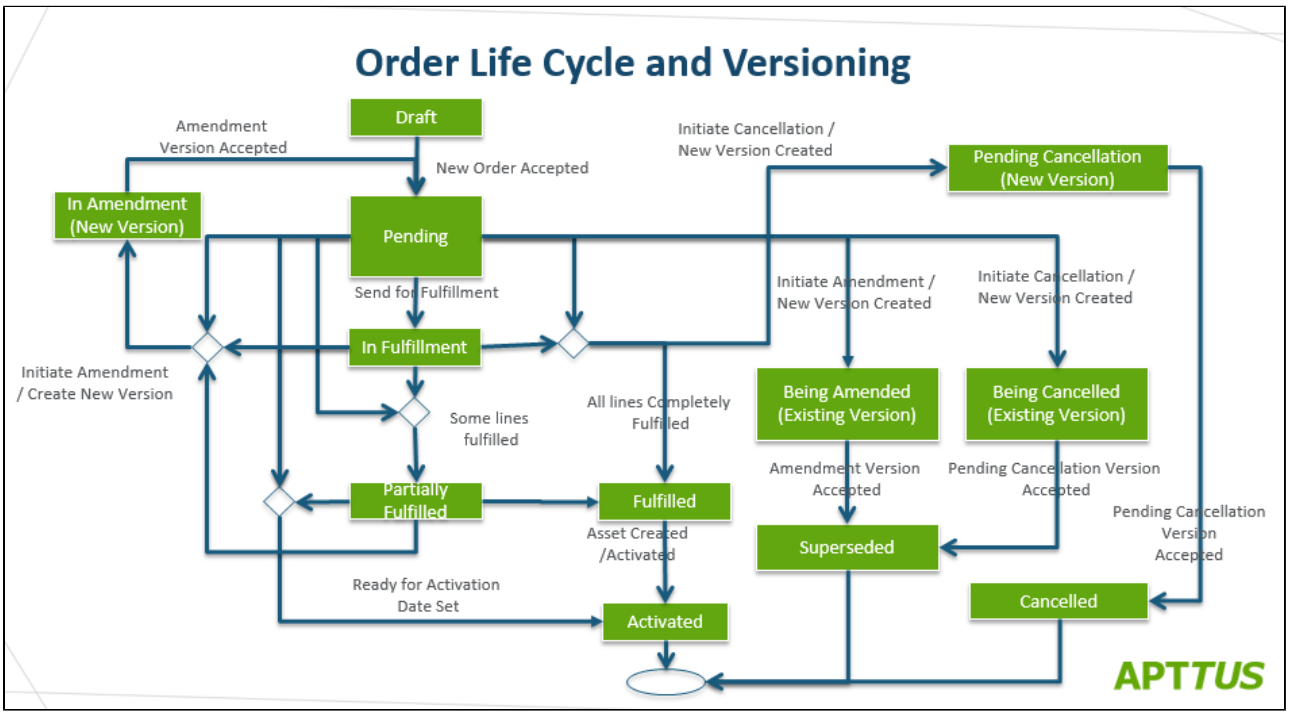
Upgrading to the Latest Order Management Package

Before you upgrade to the latest Order Management Packages do note that:

- Amend Order is not available for orders that are already " In flight" before the upgrade.
- Existing "In flight" orders need to be processed as is and cannot be amended.

Order Lifecycle and Status

Orders can be tracked by the customer support team throughout the life cycle of the orders. Order fulfillment status can be tracked at the overall order level or at the individual line item level.



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. The following diagram describes the order and order line item life cycle and integration points with assets, billing, and revenue recognition.

Order Header Status

Order Status	Description	Event / Action

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 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 the Order 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 Order is confirmed by a customer but is Pending for validation. Such Order and all the Order line items have the status as ‘Pending’.	**Accept Order / Accept Quote** Accept is a standard action button on the Order object and is used to capture customer confirmation for the Order on Order as well as on the Quote object. 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, ensure, • **Auto Create Orders** is set to *True* Go to **Custom Settings** > **Proposal System Properties** to apply this property. • **Auto Activate Order** is set to *False* Clear this flag before Accepting the Quote. You are allowed to cancel an order at this stage.
In Fulfillment	The Order and Order Line Item status changes to ‘In Fulfillment’ when the order fulfillment begins. 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 fulfillment process has begun. You are allowed to cancel an order at this stage.

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'. Activating subset of the order line items A subset of the line items can also be manually activated by setting "Ready for Activation Date" on the corresponding line items. When a subset of the Order Line Items is activated, the overall order status is set to 'Partially Fulfilled'. You are allowed to cancel an order at this stage.
In Amendment	This status is set on an 'In flight' order line item (order line item in pending or In Fulfillment), when the start date and or end date is changed using "amendOrder" API This status represents, work-in-progress changes to the order line item that have not yet been confirmed similar to a "Draft" order line item.	**Amend Order** If you change the order, a new version is created for amendment. You must Accept it to amend an order. To make In-Flight order changes use the amendOrder API. This API does the following :

Order Status	Description	Event / Action
		• Allows you to 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. • Allows you to make subscription date changes on standalone item, bundles, and multiple charge line items. • 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 on the corresponding assets. • When In flight order change capability is enabled, assets are only created on activation of the order line item. • Any order configured directly or generated from quote or eCommerce can be amended. • 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 are "Superseded", once the work-in-progress (In Amendment) changes are confirmed on "Accept" of the "In Amendment" order. **Undo Amend Order**

Order Status	Description	Event / Action
		If you proceed with Undo Amend Order, it reverts the new version to previous version, which then displays Partially Fulfilled status. You have to enable `Is quantity modifiable` custom setting at the line item level for configuring product on the cart to amend or change the order.
Being Amended	This status is set when an 'In flight' order (order in pending, In Fulfillment, or Partially Fulfilled) status is amended. This status is used with previous version of the order when an existing order version is amended. This status represents, that this version is getting amended and once the new changes are confirmed this version will get superseded.	NA
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	NA

Order Status	Description	Event / Action
Activated	• Option 1- Line item activation is initiated once the order line item is “Fulfilled” • Option 2 - Order line item is auto activated when the order is created, if the order is auto activated • Option 3 – Order line item is manually activated When activated, system will also initiate the activation of the corresponding asset	**Auto Activate Order** Orders can be activated by using the **Auto Activate Order** setting or providing a "**Ready for Activation Date**" on the Order header 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.
Superseded	This status is set on previous version of the order, when an "In Amendment" order version is accepted.	**Accept Order** When "Accept" action is used on an "In Amendment" order, then the previous version is "Superseded"
Cancelled	When an order is not fulfilled or not even partially fulfilled, then you can cancel such order.	NA

Order Status	Description	Event / Action
Pending Cancellation	When you cancel an order the status becomes Pending Cancellation and the order line items are also in pending cancellation status. In addition, a new order version is created, that you can see at Order Number field.	**Undo Cancel Order** If you proceed with Undo Cancel Order, it reverts the new version to previous version, which then displays Pending status. **Cancel Order** If you cancel the order, a new version is created for cancellation. You must Accept cancellation to cancel an order. Then the status of the order becomes Cancelled, including the order line items. In this case the previous version displays Superseded status. You can perform this action from the APIs also by passing an order id and retrieving a new version which you can use to cancel order or undo cancel order. You can also cancel an order line item from the cart for a particular order. The order line items also undergo the versioning when you cancel or amend an order.
Being Cancelled	When you cancel an order, a new order version is created while the previous order version (Original Order) displays the Being Cancelled status. However, the order line items remain in Pending status.	NA

Order Line Item Status

The status of Order and Order Line Items can differ based on the stage of the Order Fulfilment.

Order Line Status	Description	Event / Action
Draft	An Order Line Item is initially created and the Order Status is ‘Draft’.	Creating a New Order.
Pending	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 status changes to ‘In Fulfilment’ when 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	If 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	If the subscription dates of the order line items are modified before order activation.	• The changes to the order line items are also reflected on 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

Order Line Status	Description	Event / Action
		items are "Superseded", once the work-in-progress (In Amendment) changes are confirmed on "Accept" of the "In Amendment" order.
Being Amended	This status is set when start date and/or end date is changed on an 'In flight' order line item (order in pending, In Fulfillment, or Partially Fulfilled). This status is used with previous version of the order line item when an existing order version is amended. This status represents, that this version is getting amended and once the new changes are confirmed this version will get superseded.	**Amend Order** Available using "amendOrder" API
Superseded	This status is set on previous version of the order, when the order related to the "In Amendment" order line item is accepted.	**Accept Order** When "Accept" action is used on an "In Amendment" order, then the previous version is "Superseded"
Fulfilled	If the 'Fulfilled Quantity' on the Order Line Item is equal to the 'Delta Quantity'.	On fulfillment of all Order Line Items. Directly updating the status of Order Line Item to 'Fulfilled'.
Activated	The Order Line Item can have the status 'Activated' in any of the following three scenarios:	On Fulfillment of all Order Line Items. Providing **Ready for Activation Date** on the Order.

Order Line Status	Description	Event / Action
	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 As and when Order Line Items are activated,system initiates the activation of the corresponding asset.	
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**

Order Management Workflows

- Agreement to Order
- Quoto to Order
- Direct Order Configuration
- Asset Manager

Agreement to Order

You can create an order from a corporate agreement by enabling **Auto Create Order** custom setting which is available on the **Comply System Properties** page. Ensure that you disable the **Auto Create Order** custom setting from the **Proposal System Properties** at this time.

To create and activate an agreement

1. Go to **Apttus Contract Management** > **Agreements** > **New**.
2. Add **Agreement Name**, **Account**, and **Price List** for the new agreement.
3. Ensure that you have added **Agreement Start Date** and **Agreement End Date**.
4. Click **Configure Products**. If the Configure Products button is not displayed in the Agreement Header, then add it from the Layout Editor.
   After clicking Configure Products, Apttus CPQ takes you to the Catalog page.
5. Select product and add more products, if required.
6. Configure the products and finalize the cart.
   Ensure that you have already added **Billing Frequency** and **Billing Rule** to the agreement.
   After you finalize the agreement, you can see the Agreement Line Items for it.
7. Click **Generate** and select a document template for your agreement. If the Generate button is not available, you need to attach a file from the **Notes & Attachment** section first.
8. After generating the agreement, click **Activate** and refresh the page. The agreement Status changes to **Activated**.

To activate an order from the agreement

After you activate an agreement, you can see the Order and the Order Line Items being created because the **Auto Create Order** custom setting is enabled.However, if you do not see the order and the order line items, then you can add the fields from the Layout Editor in the **Related Lists** section.

1. Go to Layout Editor and add the required fields such as **Order**, **Order Line Items**, **Asset Line Items**, **Asset Status**, **Order Status or Status**, **Line Item Id**, **Asset Name**, **Order Number**, and so on.
   The Related Lists section now displays the fields when you refresh the Agreement page.
   The order and the order line items show **Pending** status.
2. Edit the order and add **Ready For Activation Date**.
3. Activate the order per the Direct Order Configuration flow.
4. Specify the Billing Frequency and Billing Rule values in the Asset Line Items, if blank.
5. Add Start Date and End Date for Asset Line Items, if blank.

6. Provide the **Original Start Date** from the Layout Editor in the **Term** section, if unavailable for Order and Asset Line Items.
7. Refresh the page and you can see the activated Order.

Quoto to Order

You must enable **Auto Create Order** custom setting in the Proposal System Properties in order to create an order from a quote

To create Order from Quote

1. Create a quote. For more information on how to create a quote/proposal, see Creating Quote /Proposals from Opportunities in the CPQ SFDC User Guide.
2. Configure a product. For more information on how to configure products, see Adding Products to the Shopping Cart in the CPQ SFDC User Guide.
3. After finalizing the cart, on the proposal page go to **Actions** section and do the following:

- **Preview**: View the generated proposal in runtime environment.
- **Generate**: Generate the proposal based on a template. The status changes to *Generated* on the proposal page.
- **Present**: Send the proposal to client. The status changes to *Presented* on the proposal page.
- **Accept**: After you have presented the proposal, you are allowed to accept it, which in turn creates the order and order line items on the proposal page. The status changes to *Accepted* on the proposal page.
  The status of the order and the order line items is *Pending*.

Direct Order Configuration

You can create a new order, add-on order, and edit the existing orders for customers. For more information on the Order Management Life Cycle, see Order Lifecycle and Status.

To create Order, Order Line Items, and Order Fulfillment Line Items

1. Go to **All Tabs** > **Orders** > **New**.
2. Select the status as **Draft**.

3. Select **Billing Preference**, **Bill To**, **Sold To**, and **Price List**. In some cases, you can use a contract price list instead of standard one if you already have that negotiated with a particular premium loyal customer.
4. Select a **Source** as **Account**.
5. Specify an **Order Date** and click **Save**.
6. A new order is created. You can enable **Auto Activate Order** setting if you want your order to be automatically activated upon finalizing a quote/proposal.
7. Click **Configure Products** and go to Catalog page.
8. You can configure the products, change the quantity, reprice the product, and finalize the cart.
   Apttus CPQ creates the order line items for the order.
9. Click Accept. The order and its line items Status changes to Pending.

From the order fulfillment perspective, you must specify the **Service Location** (Shipped from Warehouse or Plant) and the **Ready for Fulfillment Date** from the **Order Line Items**. A service location is different from an account location where the products get deployed. You can set rules to fulfill orders against locations. For example, you may want to set a rule that help you categorize the orders related to the USA under $ currency price lists and not under INR currency price lists.

You can also manage the **Quantity**, the **Delta Quantity**, and the **Fulfilled Quantity** values on the order line items.

The order fullfllment line items are created automatically when the order is getting fulfilled.

Asset Manager

For detailed information on the Asset Management, see Managing Assets in the CPQ SFDC User Guide.

Order Capturing

Apttus Orders can be created from any of the following sales channels:

- Direct Sales
- Partner Sales
- Telesales
- E-Commerce

You can create Orders from Quotes or Agreements after they are accepted by the customer. An Order can be directly created by self-service end-customer or self-service partner through E-Commerce or Partner Commerce. Custom Service representative or Telesales person can directly capture Orders on behalf of the end-customer.
Order capture supports following capabilities:

- Configuration / Pricing
- Promotions
- Shipping Calculation
- Tax Calculation

You can generate an Order from a Quote after it is accepted by the customer. Orders can also be created directly by Customer Service Representatives or Telesales agents.

When you create an Order from the quote, Order Line Items are created to reference every individual asset purchase. Check out how you can create Order from any one of the following ways:

- Convert quote to order
- Convert agreement to order
- Create E-Commerce order
- Create direct order from account

Create an Order from Quote

You must configure a custom setting to enable automatic Order creation. Go to **Custom Settings** > **Proposal System Properties** and check **Auto Create Order**.

You can create an Order from the Quote once it is accepted by the customer.

Create E-commerce Order

You can create orders with the help of following self-service APIs:

API	Details
CreateOrder	Creates an order header with an Account, Price List and pricing date.
CreateCart	Create Product Configuration (Cart) for a given order. This allows performing configuration and pricing of products for the given order.

API	Details
SynchronizeCart	To synchronize product configuration (Cart) line items with the order to create order line items. This can be invoked when saving the cart or when the order is confirmed by the customer.
CreateAsset	This allows the creation of asset line items from the order line items.
AcceptOrder	Accept Order API is used to finalize a draft order when the customer confirms the order. Accept order API performs the following functions: • If **Auto Activate Order** = False • Order and Order Line Item status is set to 'Pending' • Asset Line Items are created in 'Pending' status • If **Ready for Billing Date** is set, billing schedule generation is initiated • If **Auto Activate Order** = True • Order and Order Line Item status is set to 'Activated' • Asset Line Items are created in 'Activated' status If 'Ready for Billing Date' is set, billing schedule generation is initiated Order line item activation on Accept Order or QuoteInitiate logic for order line item activation, which will activate all the line items as well as order header. It will also create and activate assets. • INDEPENDENT LINE ITEM: If ready for activation date is set on the order line item and status of the order line is in “In Amendment” or “Draft”, then system will mark the line item as “Fulfilled” and initiate “order line item activation logic • BUNDLES OR MULTI-CHARGE TYPES WHEN Create Asset on Order Activation = TRUE If ready for activation date is set and status of the order line is in “In Amendment” or “Draft”, then system will mark the line item as “Fulfilled”. Initiate activation logic, if the current fulfilled item is last item in the bundle or multi-charge items

API	Details
	• BUNDLES OR MULTI-CHARGE TYPES WHEN Create Asset on Order Activation = FALSE If ready for activation date is set and status of the order line is in “In Amendment” or “Draft”, then system will mark the line item as “Fulfilled”. Initiate activation even if there are other items in the bundle or multi-charge types that are still NOT in “Fulfilled” status

To configure and price the order (add, edit, and remove line items, price the line items), you can use standard CPQ APIs along with the order web service APIs mentioned above.
For details on the CPQ Web Service, refer to *Apttus Winter 2017 SOAP API Reference Guide*.

Create direct Order for an Account

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 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 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.

The manual Order creation process will go through the following steps:

1. Go to **Order** from All Tabs and click **New** to create a new Order.
2. Enter the value for fields listed in the table below,

Field	Details
Account	The Account for which you are creating the Order.
Price List	Select a relevant Price List to price this Order.
Source	Select **Account** from the picklist when creating a direct Order.
Order Date	Enter the Order creation date. This forms the basis for determining the Order activation and eventually billing. By default, the current date is used as the reference to bill the order.
Billing Frequency	Enter Billing Frequency only if you want to initiate Billing on Order Activation.
Billing Preference	Enter Billing Preference only if you want to initiate Billing on Order Activation

3. The way you launch CPQ from a Quote, in the same way, you can launch it from the Order.
   Add **Configure Products** button to your page layout on the Order object.
   Click **Configure Products** and add products to the cart.
4. Finalize the cart. Order and Order Line Items are created with the 'Draft' status.
5. **Accept** Order.

Configure and Price Order

Configuration and pricing for an Order is done the same way as for Quote/Proposal using core CPQ capabilities. You can launch the CPQ cart and catalog directly from the Order.

Order object provides a standard **Configure Products** button that can be used to launch catalog, installed products page, or cart. You can also customize the **Configure products** button to pass additional parameters.

```
IF ( LEN( Apttus_Config2__PriceListId__c ) > 0 , HYPERLINK("/apex
/Apttus_Config2__OrderConfiguration?id=" &Id & "&flow=NGDefault", IMAGE("
/resource/Apttus_Config2__Button_Configure", "Configure Products"),"
_self"), NULL)
```

> On Order or Order Line Item, if you cannot find *Draft* as one of the values in the **Status** field, you should add it to the picklist.

The Order is generated in the *Draft* status. Order line items are created from the Cart line items after the cart is finalized in the *Draft* mode.

Finalize Configuration

Finalize Configuration/Create Order Line Items from the cart.
Order Line Items can be created from Cart Line Items using one of the following options:

- Synchronize cart line item
- Finalize Cart

Order line items from the cart are created in *Draft* status.

Confirm Order

You can accept the Order after getting a confirmation from the customer. On Accepting an Order, you fill see following changes:

- If **Auto Activate Order** = False
    - Order and Order Line Item status is “Pending”
    - Asset Line Items are created in “Pending” status
    - 'Accept' action is no longer available
    - If 'Ready for Billing Date' is set, billing schedule generation is initiated

- If **Auto Activate Order** = True
  - Order and Order Line Item status is set to “Activated”
  - Asset Line Items are created in “Activated” status
  - “Accept” action is no longer available
  - If “Ready for Billing Date” is set, Billing Schedules are generated

Cloning an Order

You can clone an order and it's line items by either using the cloneOrder API or the clone button.

To clone an order by using the **Clone** button,

1. Navigate to the Order Detail page.
2. Click Edit Layout.
3. From the Buttons and Links section, drag and drop the Clone Order button on the Order Detail Layout.

You can do a standard clone to clone only the order header. You may want to do a deep clone that clones not only the order header but also order's line items and any related product configuration of the cart.

Clone Order API allows to do a deep clone of an order. The Clone order API creates a new copy of the order along with its related objects rather than creating a new version.

Clone order API supports following behavior:

- Deep clone of an order is allowed only for the orders where all the order line items have the line status as"New". Any order with ABO line items cannot be cloned
- Cloning an existing order will set the status of the order header and order line items to "Draft".
- Cloning an existing order will reset the following fields: Asset Line Item, Ready for Activation Date, and Ready for Billing Date.
- Deep clone will also clone the corresponding cart and cart line items. Cart line items can then be configured and changes similar to a new draft order.

For more information on the SOAP API, see API Reference Guide.

In-flight order changes and Cancellation

- Changing an In-flight Order
- Versioning of an Order
- Cancelling an Order

This functionality provides you an ability to change orders after order confirmation and before fulfillment. You can do the following:

- Add a new order line item
- Cancel an existing order line item
- Change an existing order line item

While changes to an existing order line item include modification of quantity, subscription dates, discounts, and other pricing parameters.

For details on the workflows, see Order Management Workflows.

For more information on APIs, see *Apttus SOAP Winter 2017 API Reference Guide - Salesforce Platform* > Order Web Service section.

Changing an In-flight Order

The following enhancements are made at the API and UI level to revert the changes that you made to the customer orders.

- To make In-Flight order changes use the **amendOrder** API. However, if you want to revert the changes you can use the **UndoAmendOrder** API.
  This API is a composite API that enables you to undo or revert the amended order. For example, You can roll back the changed order date to previous date using this API.

Amend Order

The amend Order feature enables you to make subscription date changes on the order line items of an "In Flight" order.

You can change an in-flight order using the **Amend Order** button on the **Orders** UI or the **amendOrder** API.

Orders with status as Pending, In Fulfillment, or Partially Fulfilled are considered in flight orders. The in-flight order capability is used in a scenario when there is a delay in provisioning or fulfillment of the subscription after the order has been confirmed by the customer and before it is fulfilled.

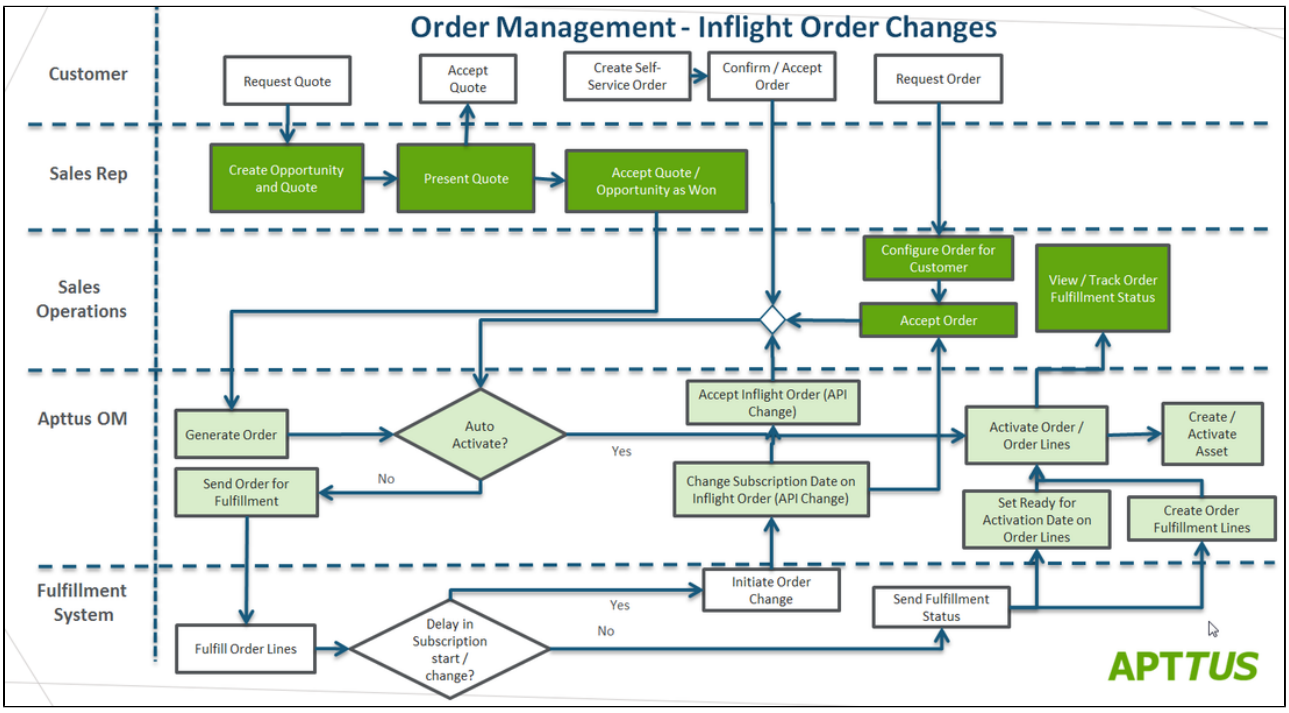
You can do the following using this feature:

- Allows you to 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.
- Allows you to make subscription date changes on standalone item, bundles, and multiple charge line items.
- 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 on the corresponding assets.
- When In flight order change capability is enabled, assets are only created on activation of the order line item.
- Order line items that are added from catalog (line status = "New") or created through ABO actions (line status In "Amended", "Cancelled", "Renewed", "Upgraded") can be amended.
- Any order configured directly or generated from quote or eCommerce can be amended.
- 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 are "Superseded", once the work-in-progress (In Amendment) changes are confirmed on "Accept" of the "In Amendment" order.

Undo Amend Order

The undo amend order feature enables you to undo or revert the amended order using the **Undo Amend Order** button on the **Orders** UI or the **UndoAmendOrder** API.

For example, You can roll back the changed order date to previous date.



> To support the cart line items, Order Line Item and Order Line Status fields are available on the cart.

Order System Properties

To enable in-flight order changes ensure the following settings are enabled in Order System Properties.

System Properties	Value to be set
Enable Inflight Changes And Cancellation	To be selected (True) in order to Amend or Cancel an order.

New UI for Amend Order

On the Order Detail page **Amend Order** button takes you to the previous UI. If you want to go to new UI, then the following configuration needs to be done:

Go to **Set up** > **Objects** > **Apttus_Config2__Order__c** > **Buttons, Links, and Actions** > Click **New Button or Link.**

While creating the Order Detail button, you can assign the values for each field as mentioned below.

Label: Can be Anything as per user's preference

Name: Can be Anything as per user's preference

Display Type: Detail page button

Behavior: Can be Anything as per user's preference

Content Source: URL

URL Syntax:

```
/apex/Apttus_Config2__OrderAmend?id={!Apttus_Config2__Order__c.Id}
&flow=NGDefault
```

After the button is created, replace the newly created button with the existing button for Amend Order in your Order Detail Page Layout.

Versioning of an Order

An Apttus CPQ maintains a version history when you work with new or existing orders.

An order header contains the following fields that are used in versioning of an order when you do amendment or cancellation, in order to maintain the version history:

- **Previous Version**: This is the previous version of respective order record before change (Amendment/Cancellation) was made to the respective order.
- **Next Version**: This is the order version, which is updated or copied as a result of amendment/cancellation on the respective order.
- **Original Order Number**: This is the Order Number that is associated with an order record, which was placed for the first time.
- **Version Number**: This is the version number that is associated with the respective order.

When you amend or cancel an order, the Apttus CPQ creates a new version.

Cancelling an Order

The following enhancements are made at the API and UI level to revert the changes that you made to the customer orders.

- To cancel an order at any point in time use the **CancelOrder** API. However, if you want to revert the cancellation you can use the **UndoCancelOrder** API.
  This API enables you to undo or revert the cancelled order and also restores the order line items. You can also observe the version history changes during this operation.

It allows cancelling an order which is created and confirmed by a customer. APIs have the following behavior:

- When you cancel an order, the status of order and its line items changes to `Pending Cancellation` and a new order version gets created. The previous order version shows `Being Cancelled` status.
- If you decide to undo the cancelled order, the new order version gets deleted and the previous order version shows `Pending` status.
- If you decide to cancel the order, you need to accept the cancellation of the order which is in `Pending Cancellation` status. As a result a new version gets created showing `Cancelled` status for the order as well as its line items. In this case the previous version shows `Superseded` status for the order and its line items.Similarly, using APIs you can cancel an order or undo the cancelled order by passing the order id. The accept API is used to complete the cancellation process.To cancel an order

For details on the workflows, see Order Management Workflows.

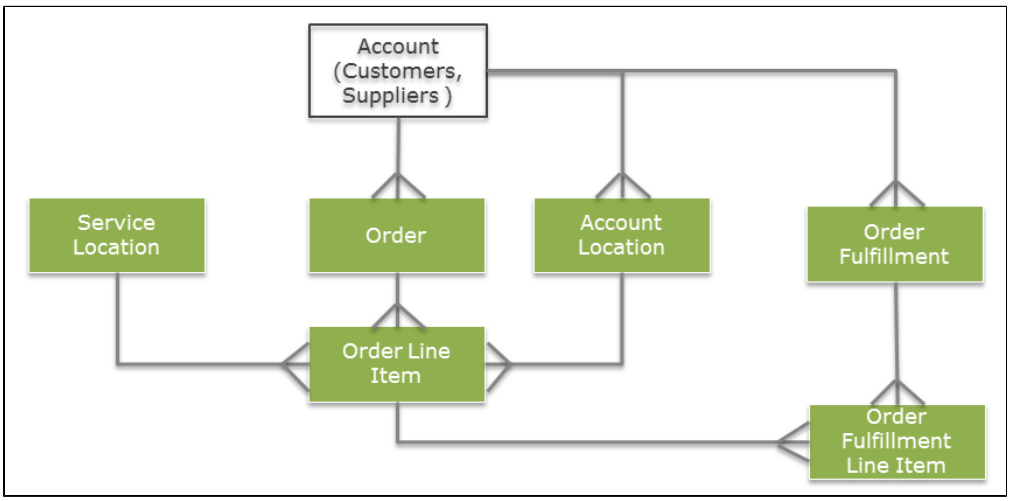
For more information on APIs, see *Apttus SOAP Winter 2017 API Reference Guide - Salesforce Platform* > Order Web Service section.

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 completed / 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

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



Data	Details
Account Location	Specifies the buyer's location where the products or services will be installed at.
Service Location	Specifies the warehouse, plant, factor, fulfillment center, service center of the seller from which the products or services will be delivered from.
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.
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 fulfillments.

Order Release to Fulfilment Systems

The process where after the Order activation, the shipment of a purchased item is done, is known as Order Fulfillment. Apttus Order Management supports distributed order fulfillment. This means a single order can be fulfilled from different locations, warehouses, factories, or at different times.

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.

Let's see an example to understand how you can track Fulfilment for an Order.

1. Create a *new* **Order** from the Order Header.
2. Add a **Billing Preference** and associate a **Price List** to the Order
3. Enter **Bill To** and **Ship To** Account details.
4. Set **Source** as Account.
5. Click **Configure Products** button to launch CPQ.
6. Add a Product A to the cart. Change its **Quantity** to **4**.
7. Reprice and Finalize the cart. The Order and Order line items are created in the *Draft* mode.
8. Click **Accept**. The Order and line item **Status** is changed to **Pending**.

To track fulfillment for this Order Line Item, you can select a Service Location and provide the Fulfilled Quantity. You can add service locations from the **Service Location** object. Go to **All Tabs** and look for Service Location. Follow the steps listed below to create a fulfilment line item:

1. Create a new **Fulfilment Line Item**. Enter the **Fulfilment Quantity** as **2** and select the **Order line Item** associated with this fulfillment.
2. **Save** your changes. You will see the **Order** and **Order Line Item** is set to *Partially* Fulfiilled. If you create another Fulfilment Line Item with the remaining Quantity, the **Status** Order and Order line item changes to *Fulfilled*.

Partial Order Fulfillment and Tracking

Apttus Order Management supports Partial Order Fulfillment. Accordingly, Order activation and related activities can be controlled 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 i.e. 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.

Flow of Data

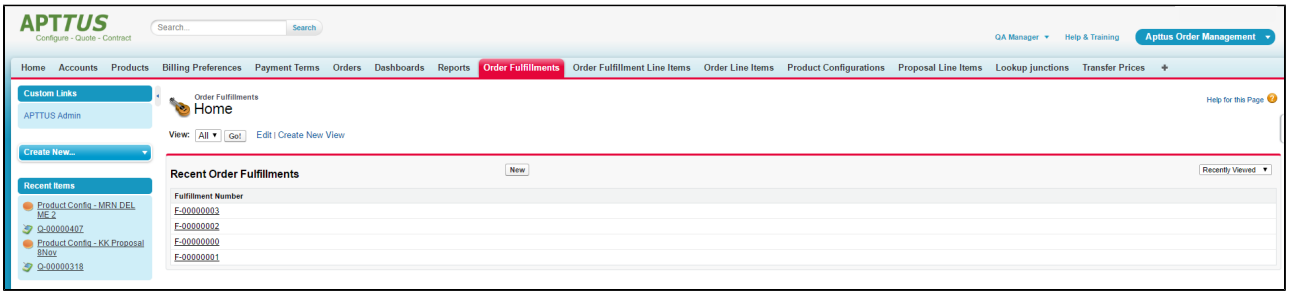
Once the Order and/or order line items are ready for fulfillment, the fulfillment process can start. As the order line items are fulfilled, you can add the information on the fulfilled quantity to the corresponding line items by creating **Order Fulfillment Line items**. The total fulfilled quantity is rolled up from Order Fulfillment line items to the parent order line item.

- **Partially Fulfilled**: An Order line item is marked "Partially Fulfilled" if the "Fulfilled Quantity" greater than zero and less than the "Delta Quantity" on the Order Line Item.
- **Fulfilled**: An Order line item is marked "Fulfilled" if the "Fulfilled Quantity" is greater than or equal to "Delta Quantity" on the Order Line Item.

Order Fulfillment

Order Fulfillments are created based on the input from the fulfillment systems such as SAP ERP, Oracle ERP or other systems.

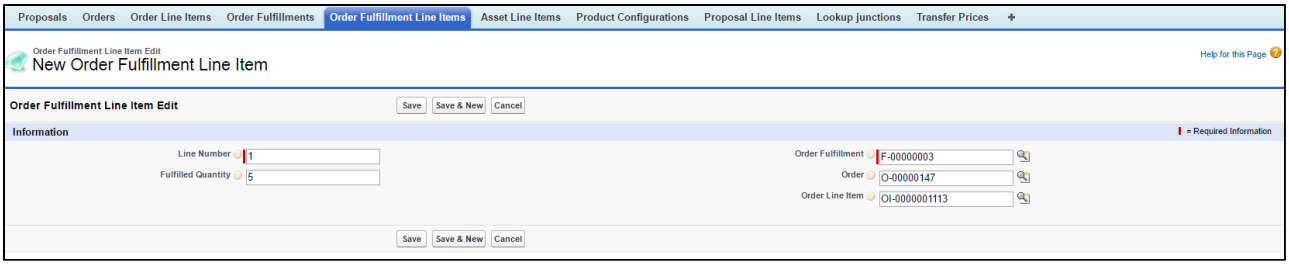
One Order fulfillment can correspond to multiple orders for a given account. One order fulfillment specifies that all order line items are fulfilled for a given customer on a particular date as a group.



As Apttus Order Management supports Partial Fulfilment, all Order lines from given order do not need to be fulfilled for a given order fulfillment. One order can be fulfilled through multiple order fulfillments.

Order Fulfillment Line Items

Order fulfillment line items are created based on the input from the fulfillment systems as the order line item quantity is fulfilled. A given order fulfillment line item corresponds to a given order line item. It can represent 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 from order fulfillment line items is aggregated for a given line items and updated on the order line item in the field - **Fulfilled Quantity**.



Activating an Order

Order and order line item activation indicates the completion of the order fulfillment process and initiation of additional related downstream processes. The downstream processes include asset activation, billing initiation, revenue recognition among others. Orders and order line items can be activated in following ways:

- Auto Activation of Order on generation from Quote

Property/Field	Detail
Auto Activate Order (on Quote/Proposal)	When this flag is set to 'true' on the Quote/Proposal, the status of Order generated is Activated.
Ready for Activation Date (on Order)	'Ready for Activation Date' needs to be populated to activate the order on order generation from Quote/Proposal.

- Auto Activation of Order on confirmation
  You can also auto-activate the order on customer confirmation (Accept order), by specifying the option on the order header. The **Auto Activate Order** field on the order header controls the auto-activation of orders created directly.
- Order and Order Line Item activation based on the line item fulfilled quantity
  The system initiates the activation of the Order Line Item, once the **Fulfilled Quantity** is greater than or equal to the **Delta Quantity** and the Order Line Item Status is *Fulfilled*.

  Once all the order line items are *Activated*, the corresponding order is also marked as *Activated*.
- Order line item activation based on Ready for Activation Date
  Order line items can also be activated by providing a **Ready for Activation Date** on the line item.

Billing for an Order

Apttus billing and invoicing can be initiated for the orders either before or after activation of the order. Following property determines if the billing is initiated on order activation or at a later stage.

With a Custom Setting *InitiateBillingOnOrderActivation*, you can unhook Order Activation from Billing Activation. Go to **Custom Settings** > **Order System Properties** > **InitiateBillingOnOrderActivation** and

- Select this property to create Billing Schedules when Order Line Item is activated.
- Clear the checkbox to create Billing Schedules when **Ready for Billing Date** on the Order Line Item is populated.

If Ready for Billing Date is set before the Order is activated then Billing Schedules will be created when the Order is **Active**.

This setting is unchecked by default, it is recommended that you configure this setting according to your requirement right after you install the package.

Customer Purchase Orders

This functionality provides you an ability to capture customer purchase order, purchase order items, as well as original document as an attachment.

The customer purchase orders can be used to create sales orders.

A customer purchase order workflow begins with creating a tab for Customer Purchase Orders and next creating a customer purchase order along with its line items.

To create a Customer Purchase Orders tab

1. Go to **Custom Tabs** > **Custom Objects** > **New**.
2. Create a **New Custom Object tab** by specifying a Saleforce object `Customer Purchase Orders` and select a tab style.
3. Click **Next**. Keep the default settings.
4. Click **Save**.
   Apttus CPQ displays the **Customer Purchase Orders** tab besides the other tabs.

To create a customer purchase order

1. Go to **Customer Purchase Orders** tab.
2. Click **New**.
3. Fill up **Customer Purchase Order Detail**, **Account/Contact**, and **Bill To/Ship To** information.
4. Specify **Contract Number**, **Quote Number**, **Account Name**, **Contact**, **Contact Name**, Bill to and Ship to account details, and reference fields to store the IDs.
   The **Account Reference** is the record id that comes from an external system.
5. Add **Requested Delivery Date**.
6. Click **Save**. The **PO Number** is autogenerated. The **Status** of Customer Purchase Order is *New.*

To create a Customer PO Item

1. Click **New Customer PO Item** in the **Customer Purchase Order** page.
2. Click **Edit Layout** if you want or remove any fields.
3. Specify the **Contract Item Name**, **Contract Item Number**, **Product**, **Quantity**, **Net Price Start Date, End Date**, **Location**, **Ship To**, and **Ship to Account Reference**.
   The **Quote Number** is in line with the **Purchase Order** (PO) number.
4. Click **Save**. The **PO Line Number** is autogenerated. The **Status** of Customer PO Item is *New.*

You can create a Customer Purchase Order by using the standard Saleforce object APIs also.

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