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## **Order Management On Salesforce Spring 2018 Administrator Guide**

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## About this Guide

Order Management on Salesforce Administrator Guide is designed to provide administrators with information on configuring Apttus Order Management. This guide covers the most common use cases for Apttus Order Management Administration and assumes a level of familiarity with basic Salesforce and CPQ.

See the Salesforce User Guide for details on standard Salesforce functionality.

## Getting Started

Before making the configuration changes to Order Management settings, you can refer to *CPQ On Salesforce Spring 2018 Administrator Guide* to get familiar with Custom Settings and Admin Settings in general.

## Installing Order Management

For more information about Packages and System Requirements and Supported Platforms, refer to *CPQ on Salesforce Spring 2018 Release Notes*.

## About Order Management Settings

For details about **Recommended Post-Installation Configuration**, refer to *CPQ on Salesforce Spring 2018 Administrator Guide*.

## In-flight Order Changes

In order to manage the in-flight order changes, you need to configure certain settings and objects that leverage various actions on the Orders UI and help you execute order management flows seamlessly. The following table describes the different configurations for in-flight order changes:

Configuration	Description
Setting Order System Properties	<p>Go to <b>Custom Settings &gt; Order System Properties &gt; Edit System Properties</b> &gt; select the following checkboxes and click <b>Save</b>.</p> <ul style="list-style-type: none"> <li>• <b>Enable Inflight Changes and Cancellation</b></li> <li>• <b>Initiate Billing On Order Activation?</b></li> </ul>
Changing the flow for the Amend order action	<p>Go to <b>Custom Objects &gt; Order (Managed) &gt; Configure Products (NG)</b> &gt; set the formula data type for Angular UI flow.</p> <p>For example,</p> <pre>IF ( LEN( Apttus_Config2__PriceListId__c ) &gt; 0 , HYPERLINK("/apex/Apttus_Config2__OrderAmend?id=" &amp;Id &amp; "&amp;flow=NGDefault", IMAGE("/resource/ Apttus_Config2__Button_Configure", "Configure Products"), "_self"), NULL)</pre> <p>For more information about Flow Settings, refer to <i>CPQ on Salesforce Spring 2018 Administrator Guide</i>.</p>
Displaying cancel line order action on the cart	<p>Specify the Order Line Item and Order Line Status in the <b>Config System Properties</b> or including them in the <b>Display Column settings</b> for a flow</p> <p>Go to <b>Config Settings &gt; System Properties &gt; View Cart Custom Fields</b> and set the API names as follows:</p> <ul style="list-style-type: none"> <li>• Apttus_Config2__OrderLineItemId__c</li> <li>• Apttus_Config2__OrderLineStatus__c</li> </ul> <p>Go to <b>Config Settings &gt; Display Column Settings</b> &gt; Select the <b>Display Type</b> and <b>Flow</b> &gt; Add <b>Order Line Item</b> and <b>Order Line Status</b> and <b>Save</b> the custom settings.</p>
Enabling Amend Order, Undo Amend Order, Cancel Order, Undo Cancel Order actions on the Orders UI	<p>Go to <b>Order Detail page &gt; Edit Layout &gt; Order Layout &gt; Buttons</b> &gt; Search the required button &gt; Drag and drop the button to relevant section in order to make the following buttons available on the Orders UI and click <b>Save</b>.</p> <ul style="list-style-type: none"> <li>• <b>Amend Order</b></li> <li>• <b>Undo Amend Order</b></li> <li>• <b>Cancel Order</b></li> <li>• <b>Undo Cancel Order</b></li> </ul>

Configuration	Description
Adding <i>Deleted</i> value in Pricing Status field in the Line Items (Cart Line Item)	On the <b>Line Item</b> object, you have a picklist field called <b>Pricing Status</b> . When you enable in-flight management, you need to ensure this field has <i>Deleted</i> value in addition to <i>Pending</i> and <i>Complete</i> .
Exposing version details information on order and order line items	Go to <b>Order Detail</b> page > <b>Edit Layout</b> > <b>Order Layout</b> > <b>Fields</b> > Search the required version field > Drag and drop the field to relevant section in order to make the following fields available on the Orders UI and click <b>Save</b> . <ul style="list-style-type: none"> <li>• <b>Next Version</b></li> <li>• <b>Previous Version</b></li> <li>• <b>Version Number</b></li> </ul>
Displaying Change Status field on the order line items	Go to <b>Order Detail</b> page > <b>Edit Layout</b> > <b>Order Layout</b> > <b>Fields</b> > Search the <b>Change Status</b> field > Drag and drop the field to relevant section in order to make it available on the Orders UI and click <b>Save</b> .
Adding <i>In Amendment</i> status field value	Go to <b>Custom Object</b> > <b>Product Configuration (Managed)</b> > <b>Status</b> field and add a new picklist value = <b>In Amendment</b> and <b>Save</b> .  For order amendment you must configure this status field value to leverage changes to the orders.



## Direct Order Configurations

You can enable the direct order configuration by using the following settings. You need to perform direct order configuration when you create the orders for an account without quote/proposal or agreement

Configuration	Description
Adding <b>Configure Products</b> and <b>Accept</b> action buttons	<p>When you create a new order, depending on the price list that you select the Configure Products (NG) button is made available for the products which are associated with that price list.</p> <p>You can enable the visibility of Configure Products and Accept buttons by managing the Formula for the layout so you can control the styling and labels.</p> <p>For example,</p> <p>Go to <b>View Fields &gt; Accept</b>.</p> <p>Data Type: <b>Formula</b></p> <pre>IF (OR(ISPICKVAL(Apttus_Config2__Status__c, "Draft"), ISPICKVAL(Apttus_Config2__Status__c, "In Amendment"), ISPICKVAL(Apttus_Config2__Status__c, "Pending Cancellation")), HYPERLINK("/apex/Apttus_Config2__OrderAccept?id="&amp;Id, IMAGE("/resource/Apttus_Config2__Button_Accept", "Accept"), "_self"), NULL)</pre> <p><b>Accept</b> button is available for <i>Draft</i>, <i>In Amendment</i>, and <i>Pending Cancellation</i> orders and their line items when the order is not yet accepted.</p> <p>Accordingly based on the use case you can edit the layout and add the buttons.</p>
Changing flow and other properties on the Configure Products button	<p>Go to <b>Custom Objects &gt; Order (Managed) &gt; Configure Products (NG)</b> &gt; set the formula data type for Angular UI flow.</p> <p>For example,</p> <pre>IF ( LEN( Apttus_Config2__PriceListId__c ) &gt; 0 , HYPERLINK("/apex/Apttus_Config2__OrderConfiguration?id=" &amp;Id &amp; "&amp;flow=NGDefault", IMAGE("/resource/Apttus_Config2__Button_Configure", "Configure Products"), "_self"), NULL)</pre> <p>For more information about Flow Settings, refer to <i>CPQ on Salesforce Spring 2018 Administrator Guide</i>.</p>

Configuration	Description
Using Contract Price List in the Orders	<p>For standard button, use the following formula field:</p> <pre>IF ( LEN( Apttus_QPConfig__PriceListId__c ) &gt; 0 , HYPERLINK("/apex/ Apttus_QPConfig__ProposalConfiguration?id=" &amp;Id&amp; "&amp;cntrNbr_1="&amp; Apttus_Proposal__Account__r.Pricing_Agreement_Number__ c,IMAGE ("/resource/ Apttus_QPConfig__Button_Configure", "Configure Products"), "_self"), NULL)</pre> <p>Note that cntrNbr_1 parameter is passed to URL and also the example for the agreement number is a field on the account.</p>

For more information about direct order configuration flow, refer to *Order Management on Salesforce Spring 2018 User Guide*.

For more information about the APIs, refer to *Order Management on Salesforce Spring 2018 SOAP API Guide*.

## Partial Order Fulfillment

For details about Partial Order Fulfillment, refer to *Order Management on Salesforce Spring 2018 User Guide*.

To display the Order Fulfillment and its line Items for an order

1. On the **Order Detail** page, go to **Edit Layout**.
2. In the **Order Layout**, select **Related Lists > Order Fulfillment Line Items**.
3. Click **Save**.

## Generating Partial Orders from Quote or Agreement

You can generate the partial orders from the quotes or agreements. The partial orders are the customer orders that are fulfilled partially in terms of quantity.

For more information about creating partial orders, refer to *Order Management on Salesforce Spring 2018 SOAP API Guide* > **createOrders** API.

## Generating Contract Price List

Apttus Order Management generates the agreement price rules from your quote line items and a price list that contains contract pricing from your quote.

- For PLIs with 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 line item to the new PLI.

To create a contract price list

1. On the **Quote/Proposal** Object > set **Intent** picklist field > **Price Agreement** value.  
In the contract price list, contract number is equal to quote/proposal name.
2. Click **Accept**. After you accept the quote/proposal, a new price list is generated with a type, **Contract**.

Then use the following API call:

```
Boolean result = Apttus_QPConfig.QPConfigWebService.createPriceRules(proposalSO.Id, true);
```

For more information about APIs, refer to *Order Management on Salesforce Spring 2018 SOAP API Guide*.

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