APTTUS®

Order Management on Salesforce Winter 2019 Administrator Guide

Rev. A

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About this Guide

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

Topic	Description
What's Covered	This guide walks the Order Management Administrators through the entire process of installing and configuring Apttus Order Management. It provides conceptual information, step-by-step instructions, and use cases for the administration tasks provided by Apttus Order Management.
Primary Audience	Order Management Administrators
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 User Guide: Refer to this guide for detailed instructions on using Order Management. • Order Management on Salesforce Release Notes: Refer to this document for package information, system requirements and supported platforms, new features, enhancements, and resolved and known issues.

This guide describes the following tasks:

- Installing Order Management
- Configuring Order Management settings
- Enabling and configuring settings for In-Flight Orders
- Automating In-Flight Order changes
- Configuring Direct Order settings (CPQ)
- Configuring settings for capturing orders from Price Agreements
- Configuring quotes and agreements to use a Contract Price List for Price Agreement orders
- Configuring Customer Purchase Order and Customer Purchase Order Item settings
- Configuring Custom Purchase Order Admin settings

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

If you are new to Apttus Order Management, let us Get Started.

What's New

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

Release	Topic	Description
Winter 2019 Rev. A	Configuring In-Flight Order Changes and Cancellation	Updated topic to add information on configuring Cancel Order Lines in the CPQ cart.
Winter 2019	About This Guide	Updated topic.
	About Order Management	Updated topic.
	Getting Started	Deleted topic.
	Setting Up Order Management	New topic to replace deleted topic "Getting Started." Updated topic content.
	Installing Order Management	Updated topic. Moved topic under "Setting Up Order Management."
	Logging in to Order Management	New topic.
	Configuring Order Management	New topic.
	Configuring Order Management Custom Settings	New topic.
	Configuring Order Management Status	New topic.
	Upgrade Information	New topic.
	Partial Order Fulfillment	Deleted topic.
	Displaying Order Fulfillment Line Items for an Order	New topic.
	Configuring In-Flight Order Changes and Cancellation	Topic renamed from "In-Flight Order Changes." Updated topic. Merged content that was previously part of the deleted topic "Automation of In-Flight Order Changes."
	Automation of In-Flight Order Changes	Deleted topic.
	Configuring the Direct Order Workflow	Topic renamed from "Direct Order Configurations." Updated topic.

Release	Topic	Description
	Setting Up Partial Orders from Price Agreements	Topic renamed from "Generating Partial Orders from Quote or Agreement." Update topic.
	Configuring the Contract Price List for Orders With Commitment Compliance	Topic renamed from "Generating Contract Price List." Updated topic.
	Setting Up Customer Purchase Orders	Topic renamed from "Create Customer Purchase Order and Customer Purchase Order Items." Updated topic.
	Setting Up Purchase Order Admin	New topic for configuring the PO Admin (Admin UI for creating Enrichment and Validation Rules for Purchase Orders).
Summer 2019	Automation of 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	No updates	No new topics are added for this release. The guide is updated to reflect product name changes.
Summer 2018	Generating Partial Orders from Quote or Agreement	Updated admin level settings for generating partial orders from agreements/quotes.
	Create Customer Purchase Order and Customer Purchase Order Items	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 manage the life of the generated order before it creates/updates an asset. Order Lifecycle Management offers a common, streamlined process for managing orders regardless of the channel used for the creation (direct sales, partner sales, telesales, digital commerce, and Electronic Data Interchange (EDI)) through the lifecycle of the order through fulfillment.

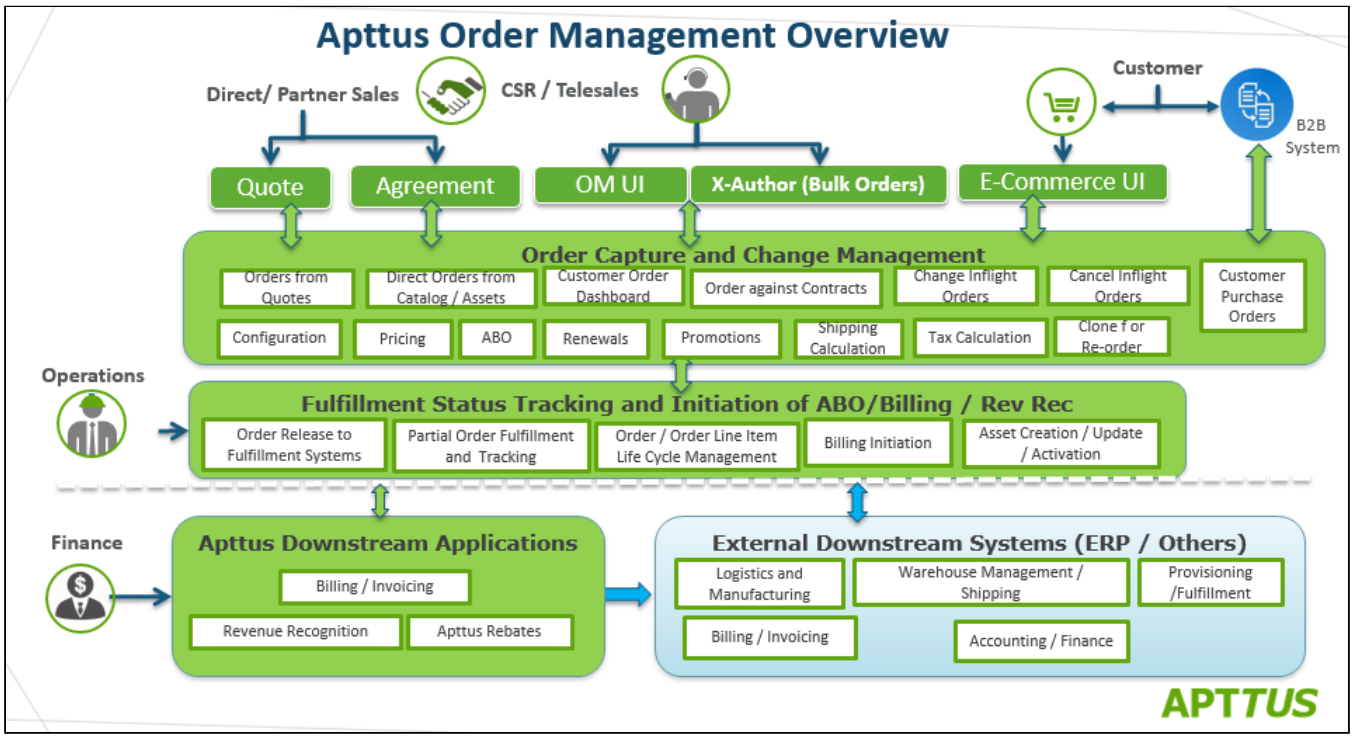
The three main stages of the lifecycle are:

- Order Capture: Order Capture: Capturing direct orders through the Order Management interface, creating customer purchase orders from a quote, and creating digital commerce orders, including orders submitted through Max Apttus AI.
- Order Change: Change management allows users to make changes to configuration, pricing, and shipping, add promotions, change or cancel in-flight orders, and reorder before the order has created or updated an asset.
- Order Fulfillment Tracking: Order release 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 CPQ.

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.
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.

Term	Description
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.*
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.

Term	Description
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.
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.

Setting Up Order Management

Apttus Order Management setup requires you to install the Order Management package on Salesforce and configure custom setting for Order Management. The following topics provide step-by-step instructions for setting up Order Management.

Before You Begin

Before configuring Order Management settings, make sure you are familiar with custom and admin settings for Apttus Configure-Price-Quote (CPQ). Refer to the *CPQ On Salesforce Administrator Guide* for details.

Installing Order Management

Refer to the latest *Order Management on Salesforce Release Notes* for information on the packages required to install Apttus Order Management.

Prerequisites

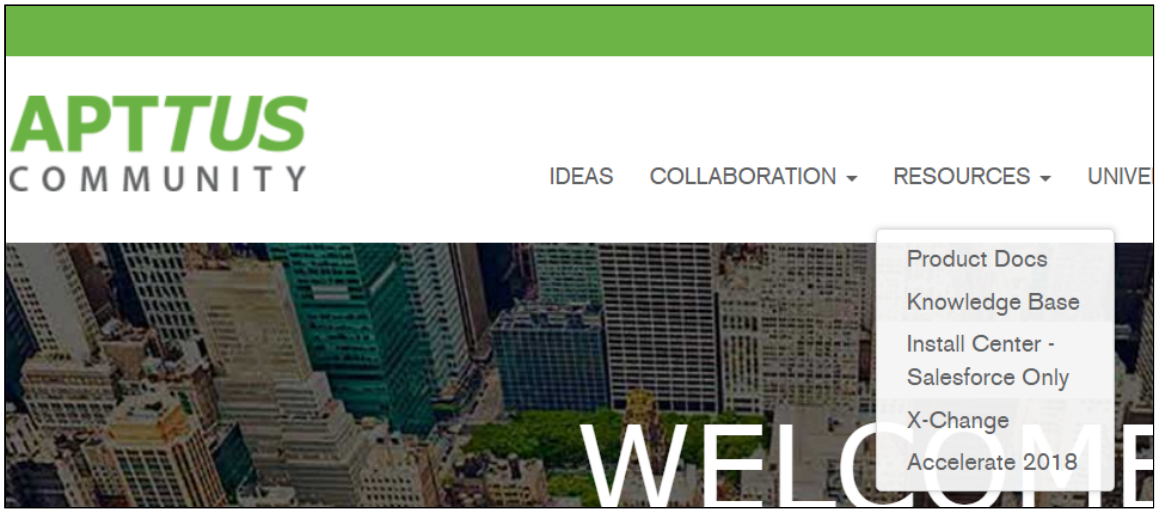
To use Apttus Order Management, you must perform the following tasks prior to installing the Order Management package:

1. **Enable Salesforce CRM Content**: Refer to the *CPQ on Salesforce Administrator Guide* for steps to perform this task.
2. **Install other Apttus packages:** Apttus Order Management requires packages to be installed for Apttus CPQ, as well as packages for any other Apttus applications (such as Approvals, Contract Lifecycle Management, and so on) that you plan to use in conjunction with Order Management. Refer to the latest *Order Management on Salesforce Release Notes* and the *CPQ on Salesforce Administrator Guide* for which packages are required.

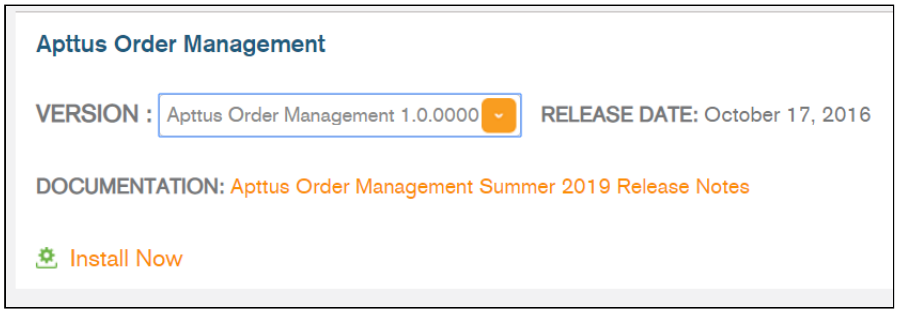
> ⓘ Apttus recommends downloading and upgrading Apttus packages in a Salesforce sandbox **before** installing them in your production environment. For information on installing and upgrading in a sandbox, please contact Apttus Support before you install any packages.

To install the Order Management package

1. Go to the **Install Center** tab on the Apttus Community Portal.



2. From the My Packages sidebar, click **CPQ**.
3. Find the Apttus Order Management package. From the **Version** drop-down, select the package version to install.



4. Click **Install Now**.
5. Select the environment where you want to install the package:
   - Click **Install in Production** to install the packages in your production environment.
   - Click **Install in Sandbox** to install the package in your sandbox.
6. Log in to Salesforce.
7. On the Upgrade page, enter the password provided by Apttus.
8. Apttus recommends that you select **Install for All Users**.
9. If you want to **Install for Specific Profiles**, you must define the access level for all profiles. Select from one of the following options:
   - **No Access:** This is the default setting. Apply this access level to disable all object permissions.
   - **Full Access:** Apply this access level to assign users permissions to Read, Create, Edit, Delete, View All, and Modify All for all objects in the Order Management package.

10. Click **Set**.
11. Click **Upgrade**.

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:

- You have installed all required Order Management packages (included Apttus CPQ packages, and packages for other integrated Apttus applications).
- You have administrative privileges.
- 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 the 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**.

Configuring Order Management

Post-installation settings are part of your specific business requirements, meaning that your implementation of Apttus Order Management will work out-of-the-box, but you can further customize the implementation using custom settings.

Refer to the topic "Recommended Post-Installation Configuration" in the *CPQ on Salesforce Administrator Guide* for detailed post-installation configuration steps for Apttus CPQ (required to support Order Management).

Configuring Order Management Custom Settings

Use Order Management custom settings to configure various features of Order Management.

To access Order custom settings, go to **Setup > Custom Settings > Order System Properties**.

Configure the following Order Management custom settings for your organization.

Setting	Description
Initiate Billing On Order Activation	Indicates whether billing should be initiated on order activation.
Create Asset On Order Activation	Indicates whether asset creation is delayed until order activation.
Enable Inflight Changes And Cancellation	Indicates whether inflight order changes and cancellation are enabled.
Agreement Fields For Partial Order2	Enter the list of field API names from the agreement object for display when creating partial orders. Each field may be separated by a comma or a new line.
Agreement Fields For Partial Order	Enter the list of field API names from the agreement object for display when creating partial orders. Each field may be separated by a comma or a new line.
Agreement Item Fields For Partial Order2	Enter the list of field API names from the agreement line item object for display when creating partial orders. Each field may be separated by a comma or a new line.
Agreement Item Fields For Partial Order	Enter the list of field API names from the agreement line item object for display when creating partial orders. Each field may be separated by a comma or a new line.
Quote Fields For Partial Order2	Enter the list of field API names from the quote/proposal object for display when creating partial orders. Each field may be separated by a comma or a new line.
Quote Fields For Partial Order	Enter the list of field API names from the quote/proposal object for display when creating partial orders. Each field may be separated by a comma or a new line.
Quote Item Fields For Partial Order2	Enter the list of field API names from the proposal line item object for display when creating partial orders. Each field may be separated by a comma or a new line.
Quote Item Fields For Partial Order	Enter the list of field API names from the proposal line item object for display when creating partial orders. Each field may be separated by a comma or a new line.

Displaying Order Fulfillment Line Items for an Order

By default, the Order Fulfillment Line Items related list is not displayed on the Order page. Perform the following task to add the related list to the Order page layout.

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**.

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

Configuring Order Management Status

To ensure that the Order Management flow assigns the correct status for orders at different stages of the lifecycle, you must add and configure all applicable status for the Order and Order Line Item objects.

To configure Order Status

1. From the Order tab, go to **Quick Access** > **View Fields**.
2. From Custom Fields & Relationships, click **Status**.
3. Click **New**. The Status Picklist Values page is displayed.
4. In the picklist entry field, enter the following status values: *Draft*, *Partially Fulfilled*, *In Fulfillment*, *In Amendment*, *Being Amended*, *Pending Cancellation*, *Being Cancelled*. Click **Save**.
5. Next to the Draft status, click **Edit**.
6. From the Picklist Edit page click the check box **Make this value default for the master picklist** and click **Save**.

To configure Order Line Item Status

1. Go to **Setup** > **Objects** > **Order Line Item**.
2. From Custom Fields & Relationships, click **Status**.
3. Click **New**. The Status Picklist Values page is displayed.
4. In the picklist entry field, enter the following status values: *Draft*, *Partially Fulfilled*, *In Fulfillment*, *In Amendment*, *Being Amended*, *Pending Cancellation*. Click **Save**.
5. Next to the Draft status, click **Edit**.
6. From the Picklist Edit page click the check box **Make this value default for the master picklist** and click **Save**.

For detailed descriptions of Order and Order Line Item status, refer to the topic "Understanding Order Status" in the *Order Management on Salesforce User Guide*.

Upgrade Information

Refer to the *CPQ on Salesforce Administrator Guide* for information on steps to take before and after upgrading to the current version of Apttus CPQ.

Configuring In-Flight Order Changes and Cancellation

An In-Flight Order refers to an order that has been confirmed but has not yet reached fulfillment. By default, Apttus Order Management does not have this functionality enabled. You can also configure Workflow Rulesets to automate execution of workflows for In-Flight Orders Changes and Cancellation.

To enable In-Flight Order Changes and Cancellation, you must configure and make additions or changes to system properties, custom and object settings, and page layouts.

To configure In-Flight Order Change and Cancellation settings

Perform the tasks in the following table in the order described:

Configuration	Description
1. Enable In-Flight Changes and Cancellation	1. Go to **Setup > Custom Settings > Order System Properties**. 2. Click **Manage**. 3. Click the **Edit** link to the left of System Properties. 4. Click the checkbox next to **Enable Inflight Changes and Cancellation**. 5. Click the checkbox next to **Create Asset on Order Activation?** 6. Click **Save**.
2. Change the flow for the Amend Order action (optional if you want a different flow)	1. Go to **Setup > Create > Objects > Order (Managed) > Configure Products (NG)**. 2. Click **Edit**. 3. Under Formula Options, copy the formula. 4. Go back to Order object. From Custom Fields & Relationships click **New**. 5. Click the **Formula** radio button, then click **Next**. 6. Enter a **Field Label**. Press tab to automatically populate the **Field Name** based on the label you entered. Select the **Text** radio button, then click **Next**. 7. Configure the Formula that defines this field. For example: `IF ( LEN( Apttus_Config2__PriceListId__c ) > 0 , HYPERLINK("/apex/Apttus_Config2__OrderAmend?id=" &Id & "&flow=NGDefault", IMAGE("/resource/Apttus_Config2__Button_Configure", "Configure Products"),"_self"), NULL)` 8. Click **Check Syntax** to test the formula for errors. 9. Click **Next**. The Establish field-level security page is displayed. 10. Make changes to field-level security as needed. Click **Next**. 11. Select the page layout that should include this field and click **Save**. For more information about Flow Settings, refer to the latest *CPQ on Salesforce Administrator Guide*.

Configuration	Description
3. Display the **Cancel Order Lines** action on the cart	Specify the Order Line Item and Order Line Status in the **Config System Properties** or include them in the **Display Column settings** for a flow. Go to **Config Settings > System Properties > View Cart Custom Fields** and set the API names as follows: • Apttus_Config2__OrderLineItemId__c • Apttus_Config2__OrderLineStatus__c • Apttus_Config2__Quantity__c Go to **Config Settings > Display Column Settings** > Select the **Display Type** and **Flow** > Add **Order Line Item** and **Order Line Status** and **Save** the custom settings.
4. Add the **Amend Order**, **Undo Amend Order**, **Cancel Order**, and **Undo Cancel Order actions** to the Order Detail page	Go to **Order Detail** page > **Edit Layout** > **Order Layout** > **Buttons** > Search the required button > Drag and drop the button to the relevant section in order to make the following buttons available on the Orders UI and click **Save**. • **Amend Order** • **Undo Amend Order** • **Cancel Order** • **Undo Cancel Order**
5. Add the *Deleted* value to the Pricing Status field in the Line Items (Cart Line Item) object	1. Go to **Setup > Create > Objects > Line Item (Managed)**. 2. Edit the **Pricing Status** field. 3. Under Values, click **New**. 4. Add **Deleted** as a picklist value and click **Save**.
6. Expose version details information on order and order line items	1. Go to the **Order Detail** page > **Edit Layout** > **Order Layout** > **Fields**. 2. Drag and drop the **Next Version** field onto the appropriate section. 3. Repeat step 2 for **Previous Version**, and **Version Number**. 4. Click **Save**.
7. Display the **Change Status** field on the Order Line items related list	1. Go to the **Order Line Item Detail** page > **Edit Layout** > **Order Line Item Layout** > **Fields**. 2. Drag and drop the **Change Status** field onto the appropriate section. 3. Click **Save**.
8. Add the *In Amendment* value to the **Status** field in the Product Configuration object	1. Go to **Setup > Create > Objects > Product Configuration (Managed)**. 2. Edit the **Status** field. 3. Under Values, click **New**. 4. Add **In Amendment** as a picklist value and click **Save**.

Configuring Automation for In-Flight Order Changes and Cancellation

In-Flight Order Changes and Cancellation can be automated through the use of Order Workflow Rulesets and Rules that defined when to automatically amend or cancel orders based on specified criteria. No additional configuration is required to make Workflow Rulesets available to users of Order Management.

Refer to the *Order Management on SFDC User Guide* for step-by-step instructions and examples of workflow automation rules. For detailed information on invoking the execOrderWorkflow API, refer to the *Order Management on Salesforce API Guide.*

Configuring the Direct Order Workflow

A Direct Order is placed by an Order Management user either by creating a new order from the "Orders" tab or from the Order related list on an Account. To create an order in this way, you must configure the Order page with the appropriate status, buttons, and formulas to allow user to configure products and use contract pricing.

Add the **Accept** and **Configure Products (NG)** buttons to the Order page layout if they have not already been added. When you create a new order, depending on the Price List you select, the Configure Product (NG) button is displayed for the products associated with that Price List.

- Configuring the Accept and Configure Products Buttons
- Changing the Flow on the Configure Products Button
- Using a Contract Price List for an Order

Configuring the Accept and Configure Products Buttons

You can change the label and formula used for either of these buttons depending on your individual use case.

To control the visibility of Accept and Configure Products formula fields on the Orders page

1. From the Order page, go to **Quick Access > View Fields**.
2. Click **New**.
3. Click the **Formula** radio button and click **Next**.
4. Enter a mandatory **Field Label** (for example, "Accept (Pending)") and press **Tab** on your keyboard to auto-populate the **Field Name**.
5. Click the **Text** radio button and click **Next**. The Enter Formula page is displayed.
6. Enter code to be used in the formula. In this example, the Accept button is made visible when the order and its line items is in *Draft*, *Pending*, *In Amendment*, and *Pending Cancellation* status.

```
IF (OR(ISPICKVAL(Apttus_Config2__Status__c, "Draft"),
ISPICKVAL(Apttus_Config2__Status__c, "Pending"),
ISPICKVAL(Apttus_Config2__Status__c, "In Amendment"),
ISPICKVAL(Apttus_Config2__Status__c, "Pending Cancellation")), HYPERLINK("/apex/
Apttus_Config2__OrderAccept?id="&Id, IMAGE("/resource/
Apttus_Config2__Button_Accept", "Accept"),"_self"), NULL)
```

7. Click **Check Syntax** to test the formula for errors.
8. Click **Next**. The Establish field-level security page is displayed.
9. Make changes to field-level security as needed. Click **Next**.
10. Select the page layout that should include this field and click **Save**.

Changing the Flow on the Configure Products Button

To control the flow and other properties for configuring products from a direct order, you can create a new formula field as described in the previous task. In the formula, change the value after "**&flow="** to the flow you want the formula field to use when a user clicks the button from an order.

```
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)
```

For information on flows, cart views, and flow settings, refer to the *CPQ on Salesforce Administrator Guide*.

Using a Contract Price List for an Order

To identify a specific Contract Price List to use when configuring products for a direct order, you can create a new formula field as described in the steps above. In the formula field, specify the contract numbers and any field that points to the agreement.

```
IF ( LEN( Apttus_QPConfig__PriceListId__c ) > 0 , HYPERLINK("/apex/
Apttus_QPConfig__ProposalConfiguration?id=" &Id& "&cntrNbr_1="&
Apttus_Proposal__Account__r.Pricing_Agreement_Number__c,IMAGE ("/resource/
Apttus_QPConfig__Button_Configure", "Configure Products"),"_self"), NULL)
```

In the example above, the cntrNbr_1 parameter and the field which represents an agreement number on an account are passed to the URL.

For information on contract pricing, refer to the topics "Contract Pricing" and "Defining a Contract to be used in a Quote" in the *CPQ on Salesforce Administrator Guide*.

Setting Up Partial Orders from Price Agreements

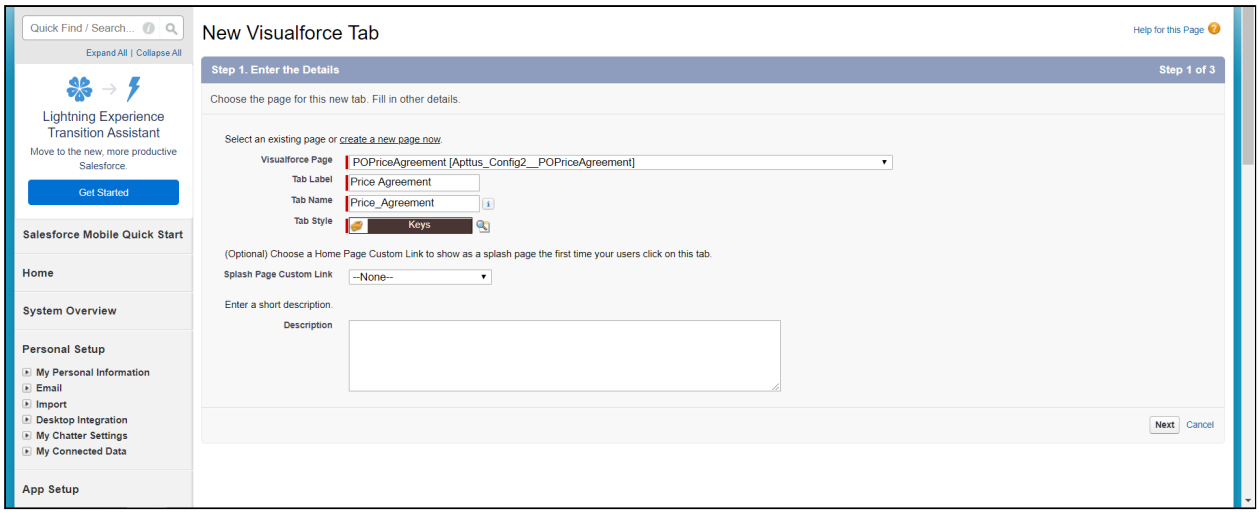
Sales orders are generated using Price Agreements from quotes or agreements where the "Intent" field is equal to "Price Agreement." This allows Order Management users to place full or partial sales orders against a Price Agreement whose line items have been pre-negotiated at specific quantities and pricing.

Configuring Price Agreements

Administrators are responsible for setting up the tab that navigates the user to the Price Agreements user interface and configuring settings that customize the layout of pages in the UI. Complete all of the following tasks to set up Price Agreements for Order Management.

To create the tab for managing Price Agreements

1. Log in to your Salesforce org.
2. Go to **Setup > Tabs**.
3. Under Visualforce Tabs, Click **New**.
4. Click Visualforce Page drop-down and select **POPriceAgreement**.
5. Enter a label for the tab (for example, "Price Agreement").
6. Press tab to autofill the tab API name.
7. (Optional) Choose a tab style.



8. Click **Next**.
9. Select tab visibility for profiles and click **Next**.
10. Select which apps will have access to this tab. Click **Save**.

To configure Order System Properties for Price Agreements

1. Go to **Setup > Custom Settings > Order System Properties**
2. Click **Manage**.
3. Click **Edit** to the left of System Properties.
4. Enter values for the properties described in the following table:

Property	Description	Example Value
Agreement Fields for Partial Order	Enter the list of field API names from the Agreement object to display as columns on the agreement list view page under Price Agreements.	Apttus__Account__c, Apttus__Account__r.Name, Apttus_CMConfig__PriceListId__c, Apttus_CMConfig__PriceListId__r.Name, Apttus__FF_Agreement_Number__c
Agreement Fields for Partial Order2	Use this field to list additional Agreement field API names when the total number of characters for the "Agreement Fields for Partial Order" property is exceeded.	
Agreement Item Fields for Partial Order	Enter the list of field API names from the Agreement Line Item object to display as columns on the agreement line item list view page under Price Agreement Details.	Apttus__AgreementId__c, Apttus__ProductId__r.Name, Apttus_CMConfig__OrderedQuantity__c, Apttus__Quantity__c, Apttus_Approval__Approval_Status__c, Apttus_CMConfig__BillToAccountId__r.Name, Apttus_CMConfig__ShipToAccountId__r.Name
Agreement Item Fields for Partial Order	Use this field to list additional Agreement Line Item field API names when the total number of characters for the "Agreement Item Fields for Partial Order" property is exceeded.	

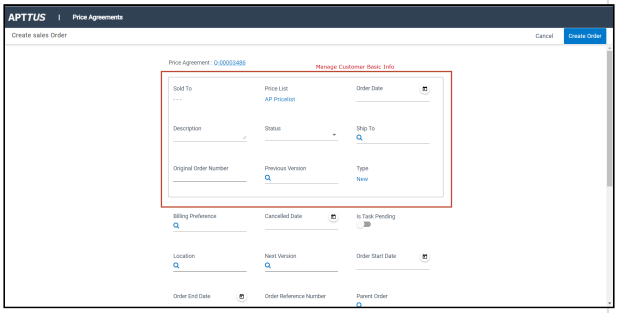
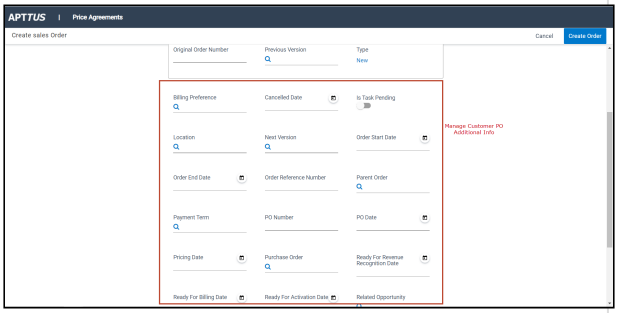
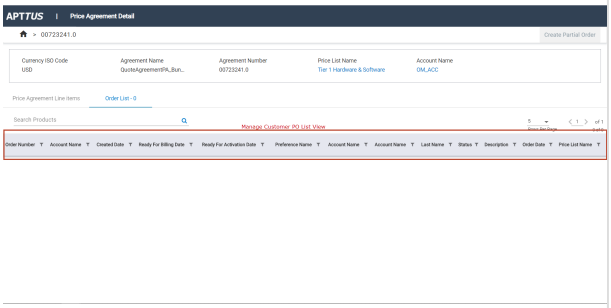
Property	Description	Example Value
Quote Fields for Partial Order	Enter the list of field API names from the Quote/Proposal object to display as columns on the quote list view page under Price Agreements.	Apttus_Proposal__Account__c, Apttus_Proposal__Account__r.Name, Apttus_QPConfig__PriceListId__c, Apttus_QPConfig__PriceListId__r.Name, Apttus_Proposal__Approval_Stage__c, Apttus_QPConfig__Intent__c, Apttus_QPConfig__ShipToAccountId__r.Name
Quote Fields for Partial Order2	Use this field to list additional Quote/Proposal field API names when the total number of characters for the "Quote Fields for Partial Order" property is exceeded.	
Quote Item Fields for Partial Order	Enter the list of field API names from the Quote/Proposal Line Item object to display as columns on the quote line item list view page under Price Agreement Details.	Apttus_QPConfig__EndDate__c, Apttus_QPConfig__StartDate__c, Apttus_Proposal__Product__r.Name, Apttus_Proposal__Proposal__c, Apttus_QPConfig__Quantity2__c, Apttus_QPConfig__OrderedQuantity__c
Quote Item Fields for Partial Order2	Use this field to list additional Quote/Proposal Line Item field API names when the total number of characters for the "Quote Item Fields for Partial Order" property is exceeded.	

⚠ Field values must be comma-separated.

5. Click **Save**.

To configure fields sets for displaying information in the Price Agreement UI

1. Go to **Setup** > **Objects** > **Order**.
2. Under Field Sets, click **Edit** next to the field set you want to configure. Refer to the following table for the list of configurable field sets and their purpose:

Field Set	Purpose	Notes
Manage Customer PO Basic Info	This field set is used to display the list of fields in the header of the Create Sales Order screen. 	Fields are displayed in the order they are added to the field set.
Manage Customer Additional Info	This field set is used to display additional fields on the Create Sales Order screen. 	Fields are displayed in the order they are added to the field set.
Manage Customer PO List View	This field set is used to determine which columns are displayed in the Price Agreement Detail screen. 	Price Agreements can be sorted or filtered by column.

3. When you are done adding fields to a field set, click **Save** to save your changes. Go to the appropriate page under Price Agreements to verify the fields are displayed.

Configuring the Contract Price List for Orders With Commitment Compliance

When setting up partial orders, you must configure the Quote/Proposal and Agreement objects to generate a Price List that refers to the product, bundle, and service line item pricing information on the quote or agreement originating the order. 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). As an administrator, you need to add the "Price Agreement" option to the *Intent* picklist custom field on the Quote/Proposal and Agreement objects. When a quote or contract with "Intent = Price Agreement" is accepted or finalized, a new Price List is generated with the type "Contract." Price List Items (PLIs) store information on the products and services copied over from the original quote or agreement.

- 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.

To configure the Quote/Proposal object for partial orders

1. From Salesforce, click **Setup > Objects > Quote/Proposal**.
2. Under Custom Fields and Relationships, click **Intent**.
3. Under Values, click **New**.
4. Add the new picklist value "Price Agreement." Click **Save**.

To configure the Agreement object for partial orders

1. From Salesforce, click **Setup > Objects > Agreement**.
2. Under Custom Fields and Relationships, click **Intent**.
3. Under Values, click **New**.
4. Add the new picklist value "Price Agreement." Click **Save**.

Setting Up Customer Purchase Orders

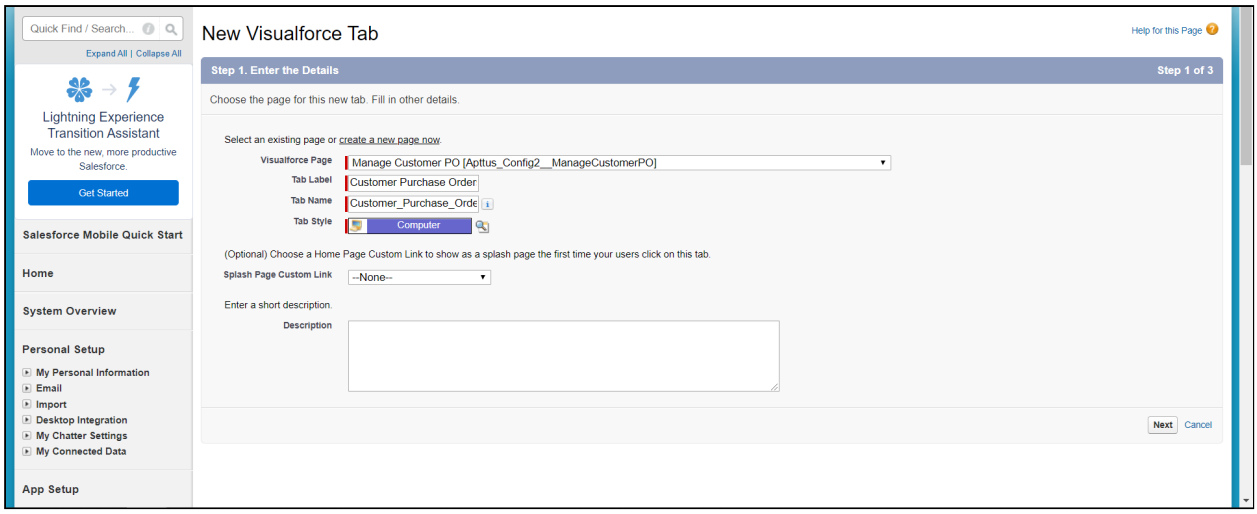
A Customer Purchase Order (PO) is a document that represents the initial offer of negotiated types, quantities, and prices for products or services. Customer Purchase Orders can be created by sales users or administrators as sales orders for long-term contracts.

Configuring Customer Purchase Orders and Purchase Order Items

Administrators are responsible for setting up Order Management to allow users to work with Customer Purchase Orders. To configure Order Management for Customer Purchase Orders, perform the following tasks.

To create a tab for managing Customer Purchase Orders and Items

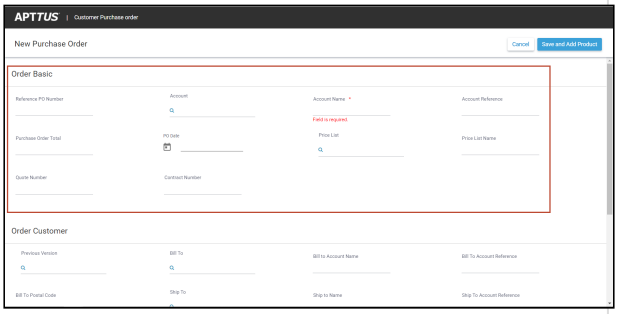
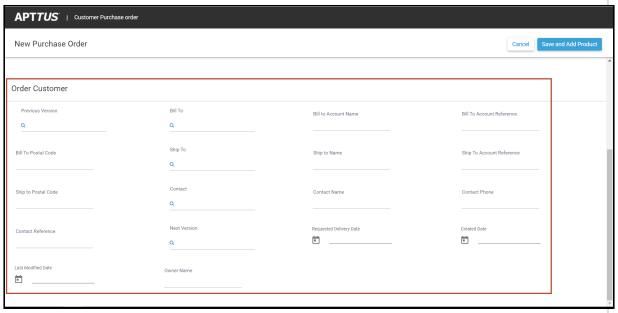
1. Log in to your Salesforce org.
2. Go to **Setup > Tabs**.
3. Under Visualforce, click **New**.
4. Click the Visualforce Page drop-down and select **ManageCustomerPO**.
5. Enter a label for the tab (for example, "Customer Purchase Orders").
6. Press tab to autofill the tab API name.
7. (Optional) Choose a tab style.

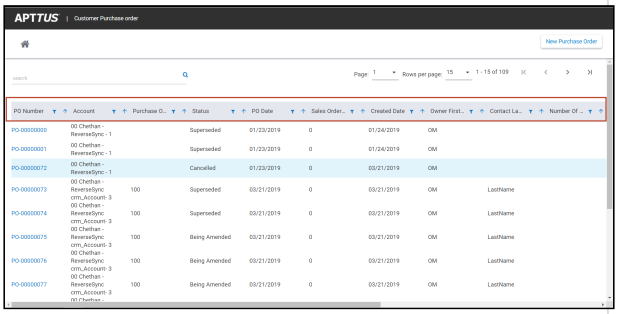


8. Click **Next**.
9. Select tab visibility for profiles and click **Next**.
10. Select which apps will have access to this tab and click **Save**.

To configure field sets for displaying information on Customer Purchase Orders

1. Go to **Setup > Objects > Customer Purchase Order**.
2. Under Field Sets, click **Edit** next to the field set you want to configure. Refer to the following table for the list of configurable field sets and their purpose:

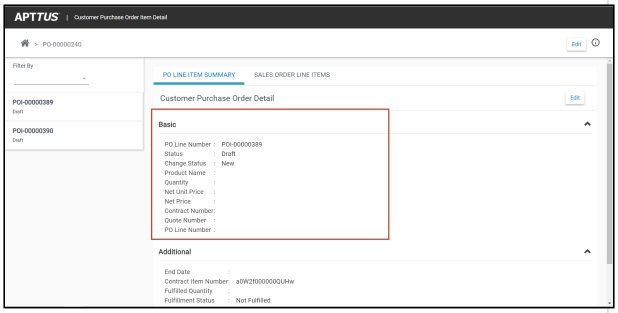
Field Set	Purpose	Notes
Manage Customer PO Basic Info	Add fields to this fields set to display field values in the "Order Basic" section of the **New Purchase Order** screen. 	Fields are displayed in the order they are added to the field set.
Manage Customer PO Additional Info	Add fields to this field set to display field values in the "Order Customer" section of the **New Purchase Order** screen. 	Fields are displayed in the order they are added to the field set.

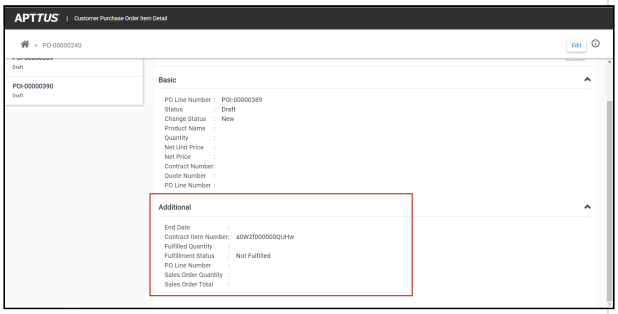
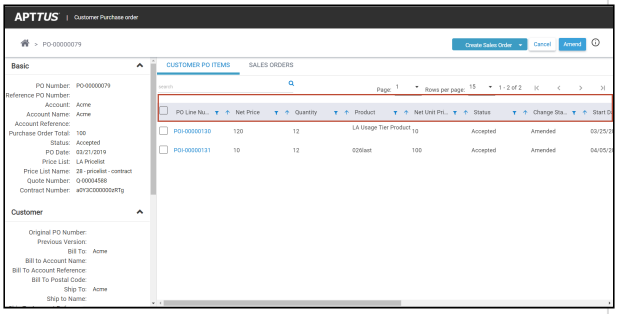
Field Set	Purpose	Notes
Manage Customer PO List View	Add fields to this field set to determine which columns are displayed in the list of purchase orders on the Customer Purchase Order screen. 	Customer Purchase Orders can be sorted or filtered by column.

3. When you are done adding fields to the field set, click **Save** to save your changes. Click on the **Customer Purchase Order** tab to verify fields have been added correctly.

To configure field sets for displaying information on Customer Purchase Order Items

1. Go to **Setup > Objects > Customer PO Item.**
2. Under Field Sets, click **Edit** next to the field set you want to configure. Refer to the following table for the list of configurable field sets and their purpose:

Field Set	Purpose	Notes
Manage Customer PO Basic Info	Add fields to this fields set to display field values in the "Basic" section of the PO Line Item Summary > Customer Purchase Order Detail screen. 	Fields are displayed in the order they are added to the field set.

Field Set	Purpose	Notes
Manage Customer PO Additional Info	Add fields to this field set to display field values in the "Additional" section of the PO Line Item > Customer Purchase Order Detail screen. 	Fields are displayed in the order they are added to the field set.
Manage Customer PO List View	Add fields to this field set to determine which columns are displayed in the list of purchase order items on the Customer Purchase Order > Customer PO Items screen. 	Customer Purchase Order Items can be sorted or filtered by column.

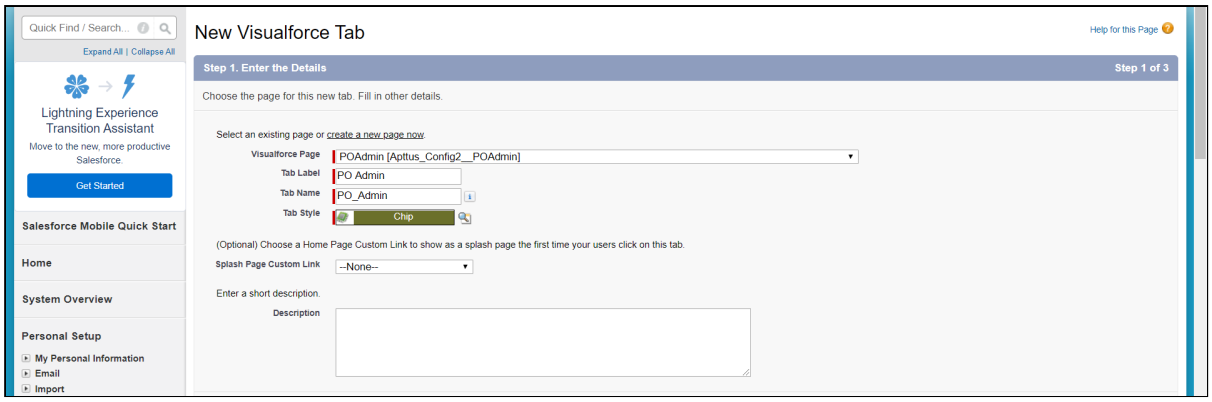
3. When you are done adding fields to the field set, click **Save** to save your changes. Click on the **Customer Purchase Order** tab to verify fields have been added correctly.

Setting Up Purchase Order Admin

Administrators are responsible for setting up Order Management to allow users to create Enrichment and Validation rules for Customer Purchase Orders. Enrichment and Validation rules are created using the Purchase Order Admin user interface. To configure the Purchase Order Admin, perform the following task.

To create a tab for managing Customer Purchase Order Enrichment and Validation rules

1. Log in to your Salesforce org.
2. Go to **Setup > Tabs**.
3. Under Visualforce, click **New**.
4. Click the Visualforce Page drop-down and select **PO Admin**.
5. Enter a label for the tab (for example, "PO Admin").
6. Press tab to autofill the tab API name.
7. (Optional) Choose a tab style.



8. Click **Next**.
9. Select tab visibility for profiles and click **Next**.
10. Select which apps will have access to this tab and click **Save**.

Appendices

Order System Properties

You can access these settings from **Setup** > **Develop** > **Custom Settings** > **Order System Properties**.

Setting	Description
Initiate Billing On Order Activation	Indicates whether billing should be initiated on order activation.
Create Asset On Order Activation	Indicates whether asset creation is delayed until order activation.
Enable Inflight Changes And Cancellation	Indicates whether inflight order changes and cancellation are enabled.
Agreement Fields For Partial Order2	Enter the list of field API names from the agreement object for display when creating partial orders. Each field may be separated by a comma or a new line.
Agreement Fields For Partial Order	Enter the list of field API names from the agreement object for display when creating partial orders. Each field may be separated by a comma or a new line.
Agreement Item Fields For Partial Order2	Enter the list of field API names from the agreement line item object for display when creating partial orders. Each field may be separated by a comma or a new line.
Agreement Item Fields For Partial Order	Enter the list of field API names from the agreement line item object for display when creating partial orders. Each field may be separated by a comma or a new line.
Quote Fields For Partial Order2	Enter the list of field API names from the quote/proposal object for display when creating partial orders. Each field may be separated by a comma or a new line.
Quote Fields For Partial Order	Enter the list of field API names from the quote/proposal object for display when creating partial orders. Each field may be separated by a comma or a new line.
Quote Item Fields For Partial Order2	Enter the list of field API names from the proposal line item object for display when creating partial orders. Each field may be separated by a comma or a new line.
Quote Item Fields For Partial Order	Enter the list of field API names from the proposal line item object for display when creating partial orders. Each field may be separated by a comma or a new line.

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