

**APTTUS<sup>®</sup>**

## Order Management on Salesforce

### Summer 2019 Administrator Guide

Rev. B

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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 Apttus CPQ.

Topic	Description
What's Covered	This guide walks the Order Management Administrators through the entire process of installing orders, configuring orders, and creating the purchase order. 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 <i>Order Management on Salesforce Release Notes</i> for information on System Requirements and Supported Platforms.
Updates	For a comprehensive list of updates to this guide for each release, see the <a href="#">What's New</a> topic.
Other Resources	<ul style="list-style-type: none"> <li>• <a href="#">Order Management on Salesforce User Guide</a>: Refer to this guide for detailed instructions on using Order Management.</li> <li>• <a href="#">Order Management on Salesforce Release Notes</a>: Refer to this guide for the new feature, enhancements, resolved, and known issues.</li> </ul>

This guide describes the following tasks:

- Installing Order Management
- Configuring Order Management settings
- Changing in-flight order
- Configuring direct order
- Creating partial order fulfillment
- Generating partial orders from quote or agreement
- Generating contract price list
- Creating customer purchase order and customer purchase order items

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.

Document	Topic	Description
Summer 2019 Rev. B	<a href="#">In-flight Order Changes</a>	Updated topic to add information on configuring Cancel Order Lines in the CPQ cart.
Summer 2019 Rev. A	<a href="#">About Order Management</a>	Updated topic to conform with Apttus Documentation standards.
Summer 2019	<a href="#">Automation of In-Flight Order Changes</a>	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	<a href="#">Generating Partial Orders from Quote or Agreement</a>	Updated admin level settings for generating partial orders from agreements/quotes.
	<a href="#">Create Customer Purchase Order and Customer Purchase Order Items</a>	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 is the focal point of customer interaction following a promise of delivery. Order Management allows customer sales and customer support representatives to capture and manage new, add-on, and renewal orders from direct sales, partner sales, telesales, digital commerce, and Electronic Data Interchange (EDI) channels. Users of Order Management can create orders from quotes, contracts, through direct entry, or bulk orders from Excel or EDI. Apttus Order Management extends Configure-Price-Quote (CPQ) functionality, beginning after buys request a quote and accept it after a round of negotiation.

Order Lifecycle Management offers a common, streamlined process for managing orders from any channel through the lifecycle of the order through fulfillment. The three main stages of the lifecycle are:

- **Order Capture:** Capturing orders from quotes or agreements, direct orders through the Order Management interface, customer purchase orders, and 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.
- **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.

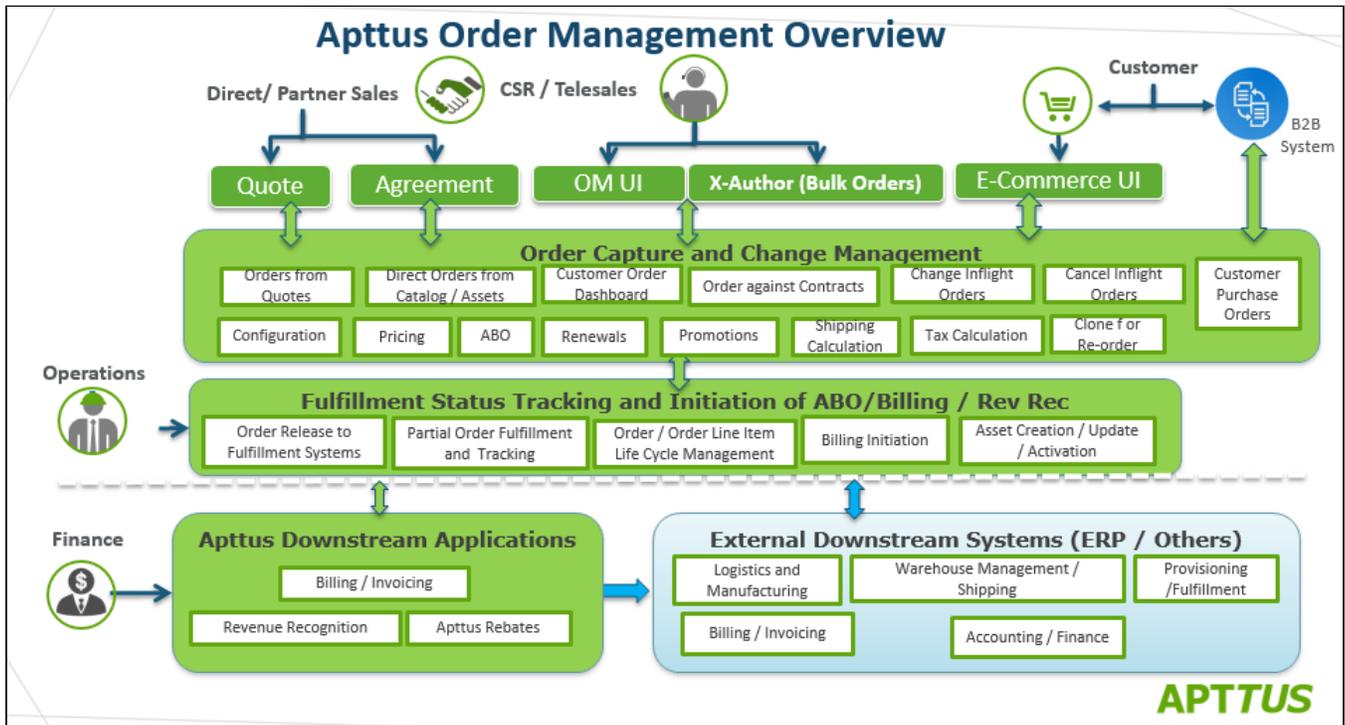
In Apttus Order Management, any order can be captured, changed, partially fulfilled, and change again depending on customer requirements.

Order Management also enables numerous downstream processes, including:

- Initiation of Apttus applications such as Asset-Based Ordering (ABO), Billing, Rebates, and Revenue Recognition.
- External systems, including ERP integration, logistics and manufacturing, accounting and finance, and warehouse management.

Advanced features 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 orders in the Quote-to-Cash Process
- Managing order lifecycle and status
- Creating order management workflows
- Capturing orders
- Creating partial orders from customer price agreement (Quote/Contract)
- Managing in-flight order changes and cancellation
- Creating distributed order fulfillment
- Activating an order
- Billing for an order
- Creating customer purchase 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.

Term	Description
Customer Purchase Order	A customer document that represents the initial offer of negotiated types, quantities, and prices for products or services. Customer Purchase Orders can be created by sales users or administrators as sales orders for long-term contracts.
In-Flight Order	The flow status of an order that is in the process of fulfillment.
Order	A confirmation document created by CPQ for a customer before delivering the goods or services.
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: <i>PartiallyFulfilled, InFulfilment, Pending, Draft, Accepted, In-Amendment, BeingAmended, Superseded, Activated, Pending Cancellation, BeingCancelled, Cancelled, and Fulfilled.</i>
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: <i>PartiallyFulfilled, InFulfilment, Pending, Draft, Accepted, In-Amendment, BeingAmended, Superseded, Activated, PendingCancellation, BeingCancelled, Cancelled, and Fulfilled.</i>
Price Lists	Containers of items that are grouped in a price list. A price list controls which products are visible to the end user. A price list contains several price list items; each linked to a product. A product can be set up with one or more price list items.
Price Matrix (Matrices)	These are an advanced pricing concept used to define tiered pricing paradigms, or complex pricing structures with multiple criteria. Common examples are pricing tiers for a product based on user count or particular customer or transactional dimensions.
Price Rule	Represents a single rule in a price ruleset.

Term	Description
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.

## Getting Started

Before making the configuration changes to Order Management settings, you can refer to *CPQ On Salesforce 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 Release Notes*.

## About Order Management Settings

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

## In-flight Order Changes

In order to manage the in-flight order changes, you need to configure the following 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 &gt;</b> 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> <li>• <b>Create Asset 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) &gt;</b> 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 the latest <i>CPQ on Salesforce Administrator Guide</i>.</p>
Displaying the <b>Cancel Order Lines</b> 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> <li>• Apttus_Config2__Quantity__c</li> </ul> <p>Go to <b>Config Settings &gt; Display Column Settings &gt; Select the Display Type and Flow &gt; Add Order Line Item and Order Line Status</b> and <b>Save</b> the custom settings.</p>

Configuration	Description
Enabling Amend Order, Undo Amend Order, Cancel Order, Undo Cancel Order actions on the Orders UI	<p>Go to <b>Order Detail</b> page &gt; <b>Edit Layout</b> &gt; <b>Order Layout</b> &gt; <b>Buttons</b> &gt; Search the required button &gt; Drag and drop the button to the 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>
Adding <i>Deleted</i> value in Pricing Status field in the Line Items (Cart Line Item)	<p>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>.</p>
Exposing version details information on order and order line items	<p>Go to <b>Order Detail</b> page &gt; <b>Edit Layout</b> &gt; <b>Order Layout</b> &gt; <b>Fields</b> &gt; Search the required version field &gt; Drag and drop the field to the relevant section in order to make the following fields available on the Orders UI and click <b>Save</b>.</p> <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	<p>Go to <b>Order Detail</b> page &gt; <b>Edit Layout</b> &gt; <b>Order Layout</b> &gt; <b>Fields</b> &gt; Search the <b>Change Status</b> field &gt; Drag and drop the field to the relevant section in order to make it available on the Orders UI and click <b>Save</b>.</p>
Adding <i>In Amendment</i> status field value	<p>Go to <b>Custom Object</b> &gt; <b>Product Configuration (Managed)</b> &gt; <b>Status</b> field and add a new picklist value = <b>In Amendment</b> and <b>Save</b>.</p> <p>For order amendment, you must configure this status field value to leverage changes to the orders.</p>

## Automation of In-Flight Order Changes

You can automate in-flight order changes, including canceling orders or amending order lines using the order workflow rules. You can use order workflow rules to automate in-flight order changes in the following scenarios:

1. Canceling an order
  - a. You may need to cancel an order due to delay in acceptance of Quote/ Order by the customer or due to provisioning fulfillment issues.

- b. On using automation rules, the order can automatically be canceled, when order is created from the quote or when a direct order is 'Accepted' or when new information is received from fulfillment/provisioning systems for orders pending fulfillment.
2. Changing an order
    - a. Order line item information including subscription start date, end date, the quantity may need to be changed or some of the order line items may need to be canceled after the order is confirmed or during order fulfillment.
    - b. On using automation rules, inflight order can automatically be changed, when order is created from the quote or when a direct order is 'Accepted' or when new information is received from fulfillment/provisioning systems for orders pending fulfillment.

### Trigger events to execute order workflow automation rules

Following are the main triggering events to execute order workflow automation rules:

1. The quote is Accepted.
  - When a quote is converted to order at the time of quote acceptance.
2. Direct order is Accepted.
  - When a Draft or In Amendment order is accepted.
3. **Ready for Workflow** field is updated.
  - When "Ready for Workflow" flag is set to true at the order header level for the orders in "Pending", "In Fulfillment" or "Partially Fulfilled" status.
  - To use this option, first, update the relevant information on the respective order line items and then set the "Ready for workflow" flag on the order header level.
4. Directly calling the API to execute order workflow rules.
  - Execution of order workflow rules can also be triggered manually by directly calling the **Order Workflow Rules API "execOrderWorkflow"**.

### Sample scenarios for Amending orders

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

Field	Operator	Map To	Value	Offset
Start Date	equal to	Function	Today	--None--
End Date	equal to	--None--		

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

- c. For example, Start Date = Provisioning Date, End Date = Previous End Date.

Input Edit					
Field	Operator	Map To	Value	Offset	
Start Date	equal to	Order Line Item	Provisioning Date(custom field)	Offset (+) Days	2 +
<input type="button" value="OK"/> <input type="button" value="Cancel"/>					

3. Quantity Changes

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

Input Edit					
Field	Operator	Map To	Value	Offset	
Quantity	equal to	Order Line Item	Available Quantity(Custom field)		+
<input type="button" value="OK"/> <input type="button" value="Cancel"/>					

4. Cancelling Order Lines

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

Input Edit					
Field	Operator	Map To	Value	Offset	
Status	equal to	--None--	Pending Cancellation		+
<input type="button" value="OK"/> <input type="button" value="Cancel"/>					

## 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
<p>Adding <b>Configure Products</b> and <b>Accept</b> action buttons</p>	<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 data-bbox="683 940 1455 1220">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>

Configuration	Description
<p>Changing flow and other properties on the Configure Products button</p>	<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 data-bbox="683 478 1455 751">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 Administrator Guide</i>.</p>
<p>Using Contract Price List in the Orders</p>	<p>For the standard button, use the following formula field:</p> <pre data-bbox="683 961 1455 1266">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_Numb er__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 User Guide*.

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

## Partial Order Fulfillment

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

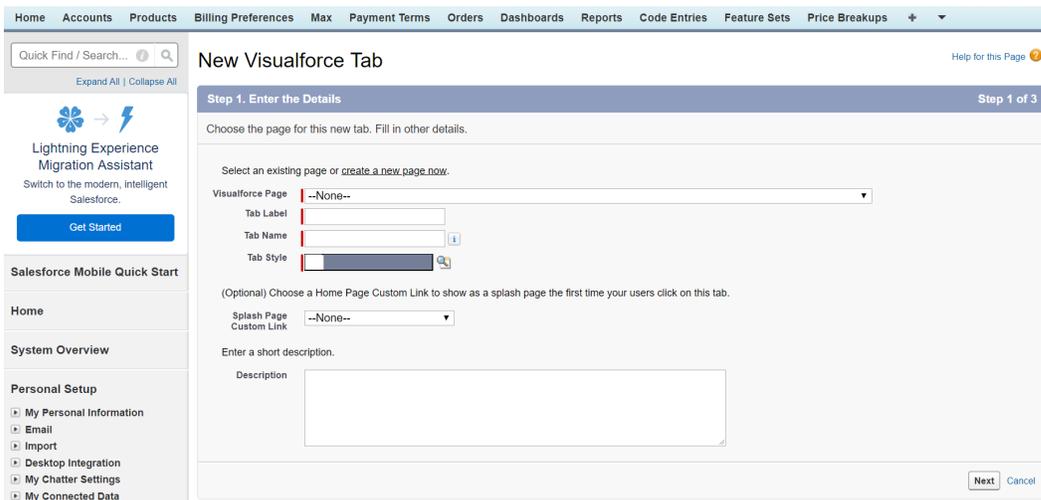
You can generate partial orders from the quotes or agreements. The partial orders are the customer orders that are fulfilled partially in terms of quantity.

To set the admin level settings for generating partial orders from agreements/quotes:

1. Create a Visualforce tab using below Visualforce page:  
Page name: **POPriceAgreement**

**Navigation:** Setup>Tabs>Visualforce Tabs>Click **New**

Populate below fields:  
 Visualforce page=POPriceAgreement  
 Tab Label=<variable>  
 Tab Name=<Variable>  
 Tab Style=<Variable>



2. Configure the fields  
 Navigate to Custom Settings > Order System Properties  
 Add the PriceAgreement mandatory fields in Order System Properties Custom Settings for the respective entities given below:

Fields	Values	Description
Quote Fields for Partial Order	Apttus_Proposal__Account__c	This is a mandatory field. It contains the values which are displayed on the agreement list view page when you select quote as priceagreement for creating partial order.
	Apttus_QPConfig__PriceListId__c	

Quote Fields for Partial Order2	Apttus_QPConfig_PriceListId_c	This field is required only when the number of characters in <b>Quote Fields for Partial Order</b> exceeds the allowed limit.
	Apttus_Proposal_Account_c	
Quote Item Fields For Partial Order	Apttus_QPConfig_EndDate_c	This is a mandatory field. It contains the values which are displayed on the agreement line items list view page when you select quote as priceagreement for creating partial order.
	Apttus_QPConfig_StartDate_c	
	Apttus_Proposal_Proposal_c	
	Apttus_QPConfig_Quantity2_c	
	Apttus_QPConfig_OrderedQuantity_c	
Quote Item Fields For Partial Order2	Apttus_QPConfig_LineType_c	This field is required only when the number of characters in <b>Quote Item Fields for Partial Order</b> exceeds the allowed limit.
	Apttus_QPConfig_ClassificationId_r.Name	
	Apttus_QPConfig_ExtendedPrice_c	
	Apttus_QPConfig_ExtendedCost_c	
	Apttus_QPConfig_BasePriceMethod_c	
	Apttus_QPApprov_ApprovalStatus_c	
	Apttus_QPConfig_StartDate_c	
Agreement Fields For Partial Order	Apttus_Account_c	This is a mandatory field. It contains the values which are displayed on the agreement list view page, when you select agreement as priceagreement for creating partial order.
	Apttus_CMConfig_PriceListId_c	

Agreement Fields For Partial Order2	Apttus_CMConfig__ShipToAccountId_r.Name	This field is required only when the number of characters in <b>Agreement Fields for Partial Order</b> exceeds the allowed limit.
	Apttus_Contract_End_Date_c	
	Apttus_Renewal_Notice_Date_c	
	Apttus_Internal_Renewal_Start_Date_c	
Agreement Item Fields For Partial Order	Apttus__AgreementId__c	This is a mandatory field. It contains the values which are displayed on the agreement line items list view page when you select agreement as priceagreement for creating partial order.
	Apttus__ProductId__c	
	Apttus_CMConfig__StartDate__c	
	Apttus_CMConfig__EndDate_c	
	Apttus__Quantity__c	
	Apttus_CMConfig__OrderedQuantity__c	
Agreement Item Fields For Partial Order2	Apttus_CMConfig__StartDate_c	This field is required only when the number of characters in <b>Agreement Item Fields for Partial Order</b> exceeds the allowed limit.
	Apttus_CMConfig_EndDate_c	

 Values should be separated by a comma while entering into the field.

3. Configure the Order Fields using fieldsets for Create Sales Order screen. Add order fields to the respective fieldset for Basic View, Additional View, and List View.
 

**Navigation:** Setup>Objects>Order>Fieldsets>

  - a. **Manage Customer PO Basic Info** (This fieldset is used to display the list of fields on Create Partial Order header screen. Fields are displayed in the sequence they are added up.)
  - b. **Manage Customer PO Additional Info** (This fieldset is used to display the list of fields on Create Partial Order header screen. Fields are displayed in the sequence they are added up.)
  - c. **Manage Customer PO List View** (This fieldset is used to display the list of fields on order list page on priceagreement details screen.)

## 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 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 create a contract price list

1. On the **Quote/Proposal** Object > set **Intent** picklist field > **Price Agreement** value.

Picklist Edit  
Intent Help for this Page

Enter a name for the picklist value below. Check the box to use this value as the default value.

Label	Price Agreement
API Name	Price Agreement
Default	<input type="checkbox"/> Make this value the default for the master picklist
Chart Color	Assigned dynamically

Save Cancel

In the contract price list, contract number is equal to the quote/proposal name.

In the homepage, a link for navigating to Price Agreement is available.

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 SOAP API Guide*.

# Create Customer Purchase Order and Customer Purchase Order Items

To set the admin level settings for creating purchase order and customer purchase order items

1. Create a Visualforce tab using below Visualforce page  
 Page name: **ManageCustomerPO** ( Link for ManageCustomerPO is available in the Homepage)  
**Navigation:** Setup>Tabs>Visualforce Tabs>Click on New  
 Populate below fields:  
**Visualforce page**=ManageCustomerPO  
**Tab Label**=<variable>  
**Tab Name**=<Variable>  
**Tab Style**=<Variable>
2. Configure Customer Purchase Order fields using fieldset  
 Add Customer Purchase Order fields to the respective fieldset for Basic View, Additional View, and List View.  
**Navigation:** Setup>Objects>Customer Purchase Order>Fieldset>  
 Manage Customer PO Basic Info  
 Manage Customer PO Additional Info  
 Manage Customer PO List View

Action	Field Label	Installed Package	API Name	Where is this used?
<a href="#">Edit</a>	Create Order From POPage FieldSet	Apttus Configuration & Pricing	Apttus_Config2__CreateOrderFromPOPageFieldSet	This field set is used in Manage Customer PO page. It is used for capturing the fields available in list view.
<a href="#">Edit</a>	Manage Customer PO Additional Info	Apttus Configuration & Pricing	Apttus_Config2__ManageCustomerPOAdditionalInfo	This field set is used in Manage Customer PO page. It is used for capturing the fields available in additional information section.
<a href="#">Edit</a>	Manage Customer PO Basic Info	Apttus Configuration & Pricing	Apttus_Config2__ManageCustomerPOBasicInfo	This field set is used in Manage Customer PO page. It is used for capturing the fields available in basic information section.
<a href="#">Edit</a>	Manage Customer PO List View	Apttus Configuration & Pricing	Apttus_Config2__ManageCustomerPOListView	This field set is used in Manage Customer PO page. It is used for capturing the fields available in list view.

3. Configure Customer PO Item fields using fieldset  
 Add Customer PO Items fields to the respective fieldset for Basic View, Additional View, and List View:  
**Navigation:** Setup>Objects>Customer PO Item>Fieldset>  
 Manage Customer PO Basic Info  
 Manage Customer PO Additional Info  
 Manage Customer PO List View

Admin can capture and process Customer Purchase Orders received from external B2B Systems.

The capability involves following functions

- Capture data from original purchase order obtained from the external system for Apttus Order Processing
- Accept/Confirm customer purchase order so that the PO can be validated

Admin can Add Item for Manual CPO Creation with minimal fields.

## 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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