



# Order Management on Salesforce Spring 2019 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 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.

Release	Topic	Description
Spring 2019 (1901)	No updates	No new topics are added for this release. The guide is updated to reflect product name changes.
Winter 2018 (1803)	No updates	No new topics are added for this release. The guide is updated to reflect product name changes.
Summer 2018 (1802)	<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

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.

At present, Apttus supports order creation through direct and partner sales and E-commerce interface. From the Order Management interface, customer support reps can create orders on behalf of the customers.

## 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 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> <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)</b> &gt; set the formula data type for Angular UI flow.</p> <p>For example,</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <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> </div> <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>

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>

## 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>

Configuration	Description
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 Administrator Guide</i>.</p>
Using Contract Price List in the Orders	<p>For the 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_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_Approval_Status__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>

- 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.)
- 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.)
- 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

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

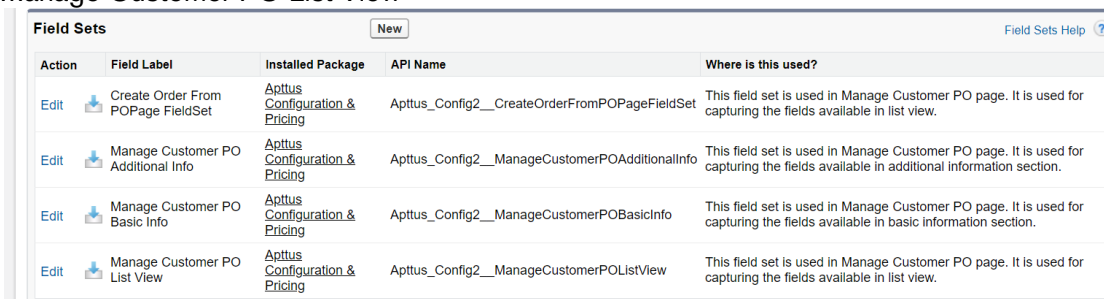
Add Customer Purchase Order fields to the respective fieldset for Basic View, Additional View, and List View.

**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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