APTTUS®

Order Management on Salesforce Spring 2019 User Guide

04/03/2019

Table of Contents

About this Guide 5
What's New 7
About Order Management 8
Getting Started 9
Obtaining the Software package 9
Order Management in the Quote-to-Cash Process 10
Getting Around with Order Lifecycle and Status 12
Order Header Status 13
Order Line Item Status 17
Order Management Workflows 20
Agreement to Order 20
To create and activate an agreement 20
To activate an order from the agreement 21
Quote to Order 21
Direct Order Configuration 22
To create Order, Order Line Items, and Order Fulfillment Line Items 22
Asset Manager 23
Total Order Amount on Order Header 23
Capturing Orders 24
Creating Orders from Quotes 24
Creating E-commerce Orders 24
Creating Direct Orders for Accounts 26
Configuring and Pricing Orders 27
Finalizing Configurations 27
Confirming Orders 27
Legal Entity on Order Line Item 28
Cloning an Order 28
Creating Partial Orders from Customer Price Agreement (Quote/Contract) 29

User flow 29
View List of Quotes/Agreements 29
View List of Quotes/Agreements 29
View List of Line Agreements from Price Agreements 30
Create Partial Orders 30
Rollup Order Line Item Information to Agreement Line Item 31
Rollup Order Line Item Information to Quote Line Item 31
Creating Partial Order from Agreement Enhancements 31
Managing In-flight Order Changes and Cancellation 33
Changing an In-flight Order 33
Amend Order 33
Undo Amend Order 34
New UI for Amend Order 35
Versioning of an Order 35
Cancelling an Order 36
Working with Distributed Order Fulfillment 37
Order Release to Fulfilment Systems 38
Partial Order Fulfillment and Tracking 38
Flow of Data 39
Order Fulfillment 39
Order Fulfillment Line Items 39
Order Fulfillment Line Item Lifecycle 40
Activating an Order 41
Billing for an Order 42
Working with Customer Purchase Orders 43
Customer Purchase Order and PO Item Status Mapping 44
Creating Customer Purchase Orders 45
Confirming or Accepting Draft Customer Purchase Orders 46
Amending Customer Purchase Orders 47
Reverting In-Amendment Customer Purchase Orders 47
Cancelling Customer Purchase Orders 48
Reverting Cancel Customer Purchase Orders 48

Adding Attachments and Viewing Activity History 48
Managing Customer PO 49
Creating a Single Order 49
Creating Multiple Sales Orders 49
Creating Partial Orders 50
Managing CPO Validation and Enrichment Rules 50
Data Enrichment Rules 50
Data Validation Rules 50
Creating Rulesets 50
Creating Rules 51
Mitigating Data Validation Issues 52
Intelligent Order Assistant (Max for OM) 53
Order Management (Out-Of-the-Box) Max Flow 53
Apttus Copyright Disclaimer 54

About this Guide

Order Management on Salesforce Spring 2019 User Guide retrieves revenue data, such as billing schedules and order terms, directly from your quotes and contracts to ensure correct invoices every time. You can easily orchestrate any type of product configuration, solution bundle, and changing order helping you eliminate errors and improve efficiency.

Topic	Description
What's Covered	This guide walks the Sales Representative through the entire process of setting up Order Management, generating payments, and reviewing orders. It provides conceptual information, step-by-step instructions, and use cases for the features provided by Apttus Order Management.
Primary Audience	• Customer Support Representative • Sales Representative
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 Administrator Guide: Refer to this guide for installing and setting up Order Management in your organization. • Order Management on Salesforce Release Notes: Refer to this guide for the new feature, enhancements, resolved, and known issues. • CPQ on Salesforce Administrator Guide: Refer to this guide for setting up products, price lists, and constraint rules.

This guide describes 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

Before using Order Management, you must be familiar with the following:

- Basic Salesforce Administration knowledge
- Apttus CPQ and Apttus CLM administration

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

- Salesforce and Apttus terms and definitions

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

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

What's New

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

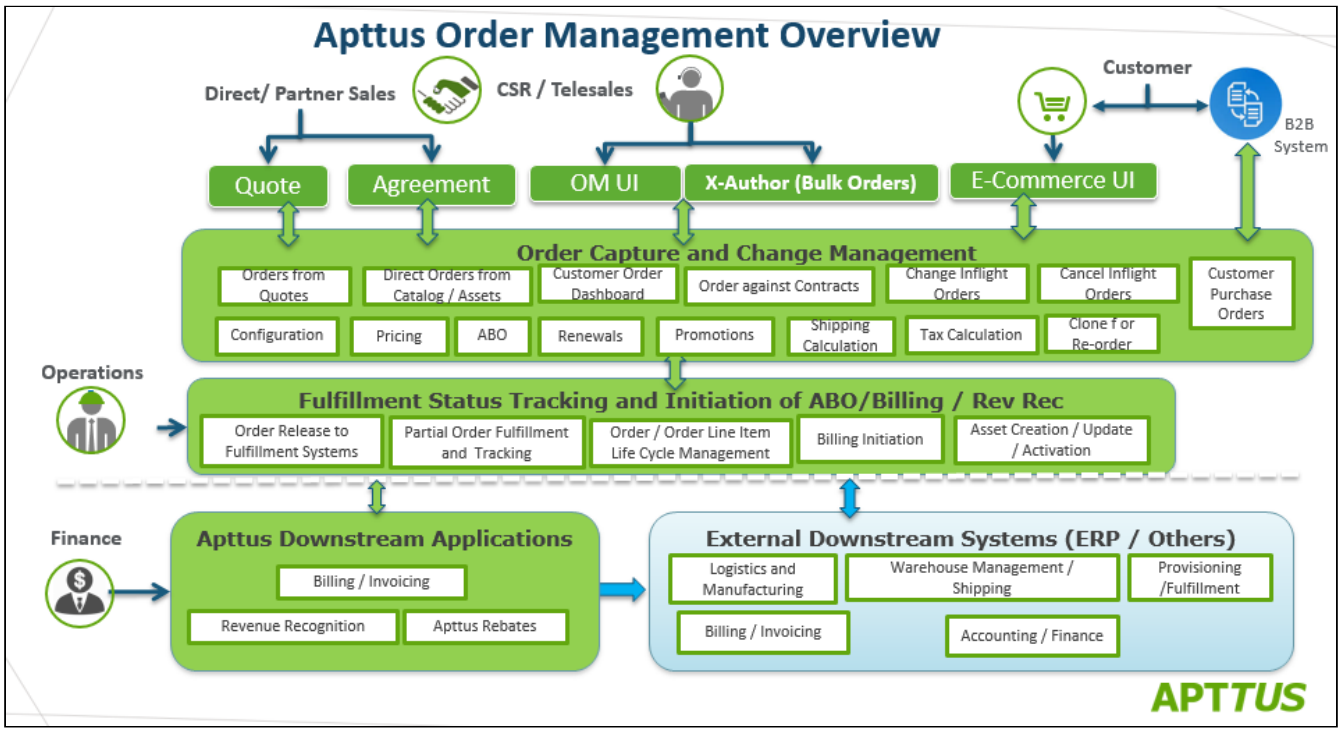
Release	Topic	Description
Spring 2019 (1901)	No Updates	No new topics are added for this release. The guide is updated to reflect product name changes.
Winter 2018 (1803)	Total Order Amount on Order Header	New topic. New feature for this release.
	Legal Entity on Order Line Item	New topic. New feature for this release.
	Creating Partial Order from Agreement Enhancements	New topic. New feature for this release.
Summer 2018 (1802)	Managing CPO Validation and Enrichment Rules	New topic. New feature for this release
	Mitigating Data Validation Issues	New topic. New feature for this release
	Managing Customer PO	New topic. New feature for this release
	Order Fulfillment Line Item Lifecycle	New topic. New feature for this release
	Creating Customer Purchase Orders	New topic. New feature for this release
	Creating Partial orders from Customer Price Agreement (Quote/Contract)	New topic. New feature for this release
	Intelligent Order Assistant (Max for OM)	New topic. New feature for this release

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

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.

Following diagram shows the order lifecycle and its interaction with different entities, at various stages in the omni-channel sales process.



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

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

Getting Started

Obtaining the Software package

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

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

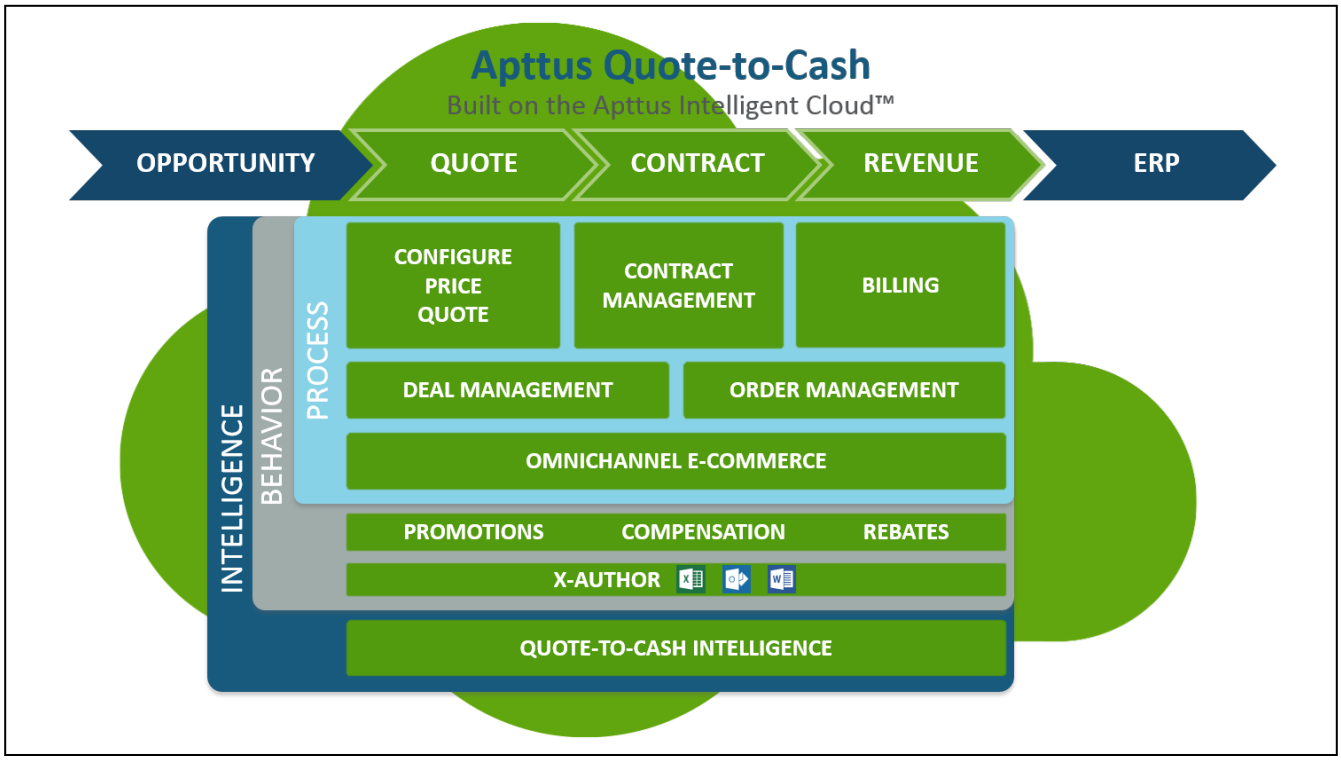
Order Management in the Quote-to-Cash Process

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

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

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

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



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

- Increase your revenue and margins
- Reduce variations in your business process
- Increase speed and agility of every transaction
- Measure cycle time of a deal from opportunity through revenue recognition
- Track your actual revenue against the targets you set
- Identify and mitigate risky deals

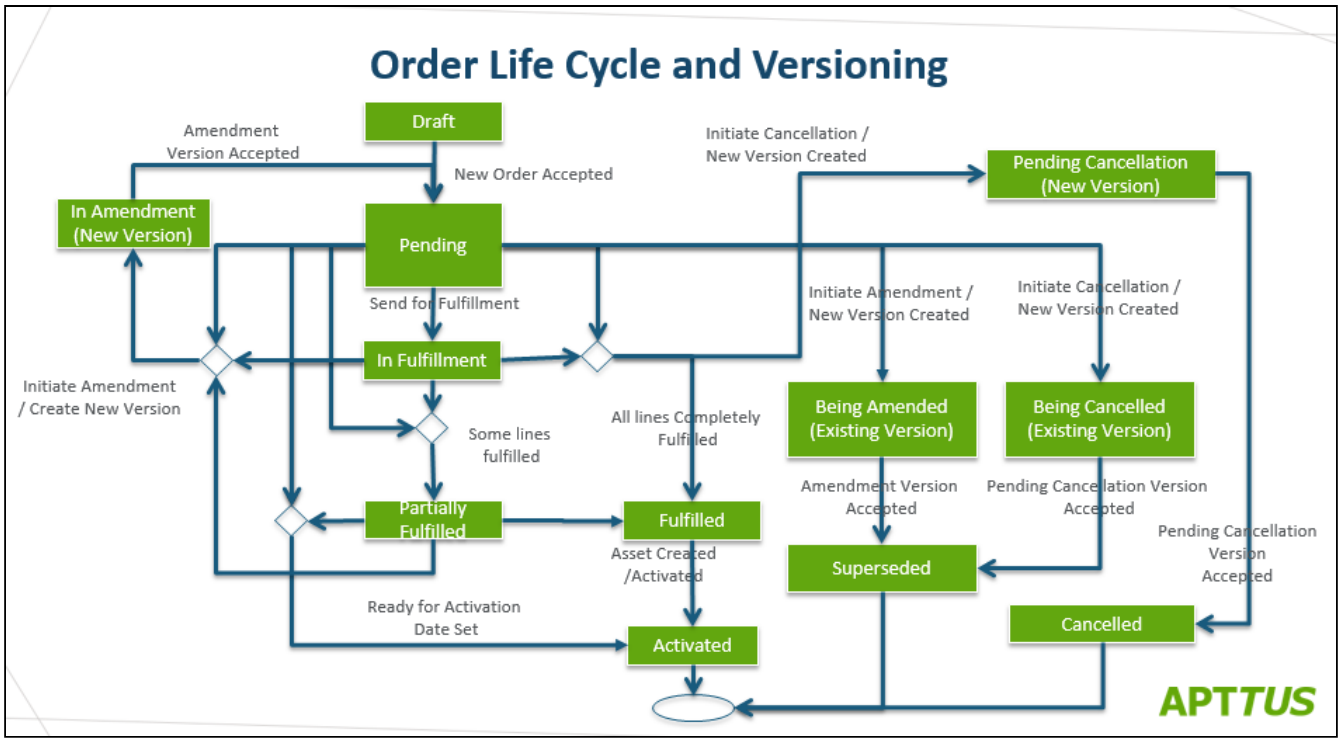
Copyright ©2011-2019 Apttus Corporation. All rights reserved.

- Increase up-selling and cross-selling opportunities
- Define, configure, and execute product promotions, sales incentives, and customer rebates

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

Getting Around with Order Lifecycle and Status

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



Order and Order line item status work as a mechanism to integrate with downstream systems and processes including fulfillment systems, asset management, billing, and revenue recognition. The following diagram describes the order and order line item life cycle and integration points with assets, billing, and revenue recognition.

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

Order Header Status

Order Status	Description	Event / Action
Draft	When an Order is initially created, its default status is 'Draft'.	**New Order** Creating a new order from the Order Page will create the Order in *Draft* status. Draft orders are work-in-progress orders and can be opened and edited without creating new versions. Ensure that *Draft* is the default status when creating the Order and Order line items. You can change the quantity of an order from the cart even when the order is in draft status. You can also clone an existing order to create a new order. For more information, see Cloning an Order.
Pending	When Order is confirmed by a customer but is Pending for validation. Such Order and all the Order line items have the status as 'Pending'.	**Accept Order / Accept Quote** Accept is a standard action button on the Order object and is used to capture customer confirmation for the Order on Order as well as on the Quote object. Accepting an Order will change the status of the Order and order line items to *Pending* if **Auto Activation** is not enabled. To generate Orders in *Pending* status from Quotes, ensure, • **Auto Create Orders** is set to *True* Go to **Custom Settings** > **Proposal System Properties** to apply this property. • **Auto Activate Order** is set to *False* Clear this flag before Accepting the Quote. You are allowed to cancel an order at this stage.

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

Order Status	Description	Event / Action
In Fulfillment	The Order and Order Line Item status changes to ‘In Fulfillment’ when the order fulfillment begins. One or more line items are in ('In Fulfillment') AND other line items are in “Pending” status	**Send for Fulfillment** You can set the status to *In Fulfillment* when the Order and Order line items are exported to fulfillment systems to initiate the fulfillment process. It indicates that the order has been released to the fulfillment systems and fulfillment process has begun. You are allowed to cancel an order at this stage.
Partially Fulfilled	When one or more line items are in 'Partially Fulfilled' status. OR If one or more line items are IN ('Activated', 'Fulfilled') status AND one or more IN ('In Fulfillment' OR 'Pending') status.	**Create Order Fulfillment Line Items** You can manage and track partial fulfillment for an Order by creating Order Fulfillment Line Items against a given Order line item. This updates the "Fulfilled Quantity" on the order line item level and also updates the status of the order line item to 'Partially Fulfilled' or 'Fulfilled' or 'Activated'. Activating subset of the order line items A subset of the line items can also be manually activated by setting "Ready for Activation Date" on the corresponding line items. When a subset of the Order Line Items is activated, the overall order status is set to 'Partially Fulfilled'. You are allowed to cancel an order at this stage.

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

Order Status	Description	Event / Action
In Amendment	This status is set on an 'In flight' order line item (order line item in pending or In Fulfillment), when the start date and or end date is changed using "amendOrder" API This status represents work-in-progress changes to the order line item that have not yet been confirmed similar to a "Draft" order line item.	**Amend Order** If you change the order, a new version is created for amendment. You must Accept it to amend an order. To make In-Flight order changes use the amendOrder API. This API does the following : • Allows you to change the start date or end date of subscription on one or more order line items that are in "Pending", "In Fulfillment", or "Partially Fulfilled" status. • Allows you to make subscription date changes on the standalone item, bundles, and multiple charge line items. • The change in subscription start and/or end date will recalculate the price for the line item or bundle after the changes are applied • The changes to the order line items are also reflected in the corresponding assets. • When In flight order change capability is enabled, assets are only created on activation of the order line item. • Any order configured directly or generated from quote or eCommerce can be amended. • Amending an order creates a new version of the order to make and track changes and has reference to the previous version. The previous version of the order and order line items are "Superseded", once the work-in-progress (In Amendment) changes are confirmed on "Accept" of the "In Amendment" order. **Undo Amend Order** If you proceed with Undo Amend Order, it reverts the new version to the previous version, which then displays a Partially Fulfilled status.

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

Order Status	Description	Event / Action
		You have to enable "`Is quantity modifiable`" custom setting at the line item level for configuring product on the cart to amend or change the order.
Being Amended	This status is set when an 'In flight' order (order in pending, In Fulfillment, or Partially Fulfilled) status is amended. This status is used with the previous version of the order when an existing order version is amended. This status represents, that this version is getting amended and once the new changes are confirmed this version will get superseded.	NA
Fulfilled	All line items in 'Fulfilled' status OR One or more line items are IN (Fulfilled) status AND One or more line items are IN ('Activated') status	NA
Activated	• Option 1- Line item activation is initiated once the order line item is “Fulfilled” • Option 2 - Order line item is auto activated when the order is created if the order is auto activated • Option 3 – Order line item is manually activated When activated, the system will also initiate the activation of the corresponding asset	**Auto Activate Order** Orders can be activated by using the **Auto Activate Order** setting or providing a "**Ready for Activation Date**" on the Order header or Quote header before accepting the corresponding Order or Quote. **Activating All Order Line Items** If all Order Line Items are independently fulfilled and activated, the entire Order will be activated.
Superseded	This status is set on the previous version of the order when an "In Amendment" order version is accepted.	**Accept Order** When "Accept" action is used on an "In Amendment" order, then the previous version is "Superseded"
Cancelled	When an order is not fulfilled or not even partially fulfilled, then you can cancel such order.	NA

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

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

Order Line Item Status

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

Order Line Status	Description	Event / Action
Draft	An Order Line Item is initially created and the Order Status is 'Draft'.	Creating a New Order.

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

Order Line Status	Description	Event / Action
Pending	An Order is confirmed by a customer but is Pending for validation.	Accepting Quote/Order. When you perform the following actions, the order line item status changes to Pending. **Undo Cancel Order** **Undo Amend Order**
In Fulfilment	The Order Line Item status changes to 'In Fulfilment' when Order Line Item has been sent for fulfillment. This Status helps in tracking the fulfillment process at the Order Line Item level.	Sending/Releasing Order to Fulfillment systems.
Partially Fulfilled	If the 'Fulfilled Quantity' is less than the 'Delta Quantity' and the value is greater than zero.	Tracking Fulfillment for each Order Line Item by creating a corresponding Order Fulfillment Line Item.
In Amendment	If the subscription dates of the order line items are modified before order activation.	• The changes to the order line items are also reflected in the corresponding assets. • When In flight order change capability is enabled, assets are only created on activation of the order line item. • Amending an order creates a new version of the order to make and track changes and has reference to the previous version. The previous version of the order and order line items are "Superseded", once the work-in-progress (In Amendment) changes are confirmed on "Accept" of the "In Amendment" order.

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

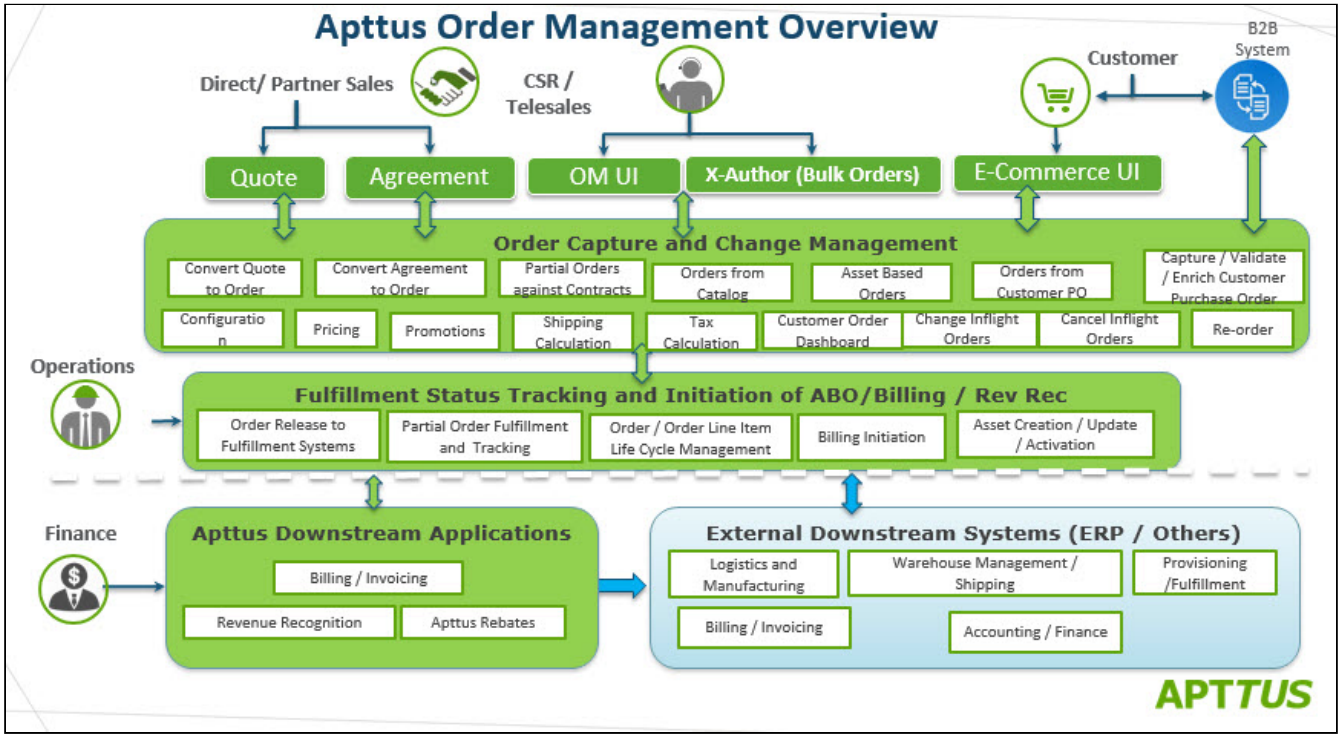
Order Line Status	Description	Event / Action
Being Amended	This status is set when start date and/or end date is changed on an 'In flight' order line item (order in pending, In Fulfillment, or Partially Fulfilled). This status is used with the previous version of the order line item when an existing order version is amended. This status represents, that this version is getting amended and once the new changes are confirmed this version will get superseded.	**Amend Order** Available using "amendOrder" API.
Superseded	This status is set on the previous version of the order when the order related to the "In Amendment" order line item is accepted.	**Accept Order** When "Accept" action is used on an "In Amendment" order, then the previous version is "Superseded".
Fulfilled	If the 'Fulfilled Quantity' on the Order Line Item is equal to the 'Delta Quantity'.	On fulfillment of all Order Line Items. Directly updating the status of Order Line Item to 'Fulfilled'.
Activated	The Order Line Item can have the status 'Activated' in any of the following three scenarios: Scenario 1 - Line item activation is initiated once the order line item is 'Fulfilled' Scenario 2 - The Order is auto activated. Scenario 3 - The Order line item is manually activated As and when Order Line Items are activated, the system initiates the activation of the corresponding asset.	On Fulfillment of all Order Line Items. Providing **Ready for Activation Date** on the Order.
Pending Cancellation	This status is set when an order is cancelled.	**Cancel Order**
Cancelled	This status is set when the cancelled order is accepted.	**Accept Order**

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

Order Management Workflows

This section describes the workflows that help you perform order management tasks.

- Agreement to Order
- Quote to Order
- Direct Order Configuration
- Asset Manager
- Total Order Amount on Order Header



Agreement to Order

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

To create and activate an agreement

1. Go to **Apttus Contract Management** > **Agreements** > **New**.
2. Add **Agreement Name**, **Account**, and **Price List** for the new agreement.

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

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

To activate an order from the agreement

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

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

Quote to Order

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

To create Order from Quote

1. Create a quote. For more information on how to create a quote/proposal, see Creating Quote/Proposals from Opportunities in the *CPQ on Salesforce Spring 2018 User Guide*.
2. Configure a product. For more information on how to configure products, see Adding Products to the Shopping Cart in the *CPQ on Salesforce Spring 2018 User Guide*.
3. After finalizing the cart, on the proposal page go to the **Actions** section and do the following:
   - **Preview**: View the generated proposal in a runtime environment.
   - **Generate**: Generate the proposal based on a template. The status changes to *Generated* on the proposal page.

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

- **Present**: Send the proposal to the client. The status changes to *Presented* on the proposal page.
- **Accept**: After you have presented the proposal, you are allowed to accept it, which in turn creates the order and order line items on the proposal page. The status changes to *Accepted* on the proposal page.
  The status of the order and the order line items are *Pending*.

Direct Order Configuration

You can create a new order, add-on order, and edit the existing orders for customers.

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

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

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

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

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

> ⚠ Sales Rep/Customer/Order Desk person can also create direct order using Max or Mobile using the Self-service interface by providing key information for the order line items.

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

Asset Manager

For detailed information on the Asset Management, see Managing Assets in the *CPQ on Salesforce Spring 2018 User Guide*.

Total Order Amount on Order Header

You can see the total order amount on the order header. Order header amount is represented in Order Header currency.

Order Amount = SUM(Net Price) from order line item based on the following conditions

- Any line item with status in cancelled, pending cancellation) is not considered.
- If option/child bundle price is rolled up into parent bundle, system considers the parent bundle net price to avoid double counting.
- Roll up is updated whenever the net price on the order line item is updated or the order line item status is updated to "Pending Cancellation" or "Cancelled".

Order amount is updated when the net price is in updated status or status is changed to pending cancellation/cancelled. Order amount is deleted, If the status of the order line item is changed to "Being Amended" "Being Cancelled" or "Superseded" or any other status (Except Pending Cancellation and Cancelled). When the net price is not changed, then rollup at order header cannot be updated.

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

Capturing Orders

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

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

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

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

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

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

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

Creating Orders from Quotes

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

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

Creating E-commerce Orders

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

API	Details
CreateOrder	Creates an order header with an Account, Price List and pricing date.

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

API	Details
CreateCart	Create Product Configuration (Cart) for a given order. This allows performing configuration and pricing of products for the given order.
SynchronizeCart	To synchronize product configuration (Cart) line items with the order to create order line items. This can be invoked when saving the cart or when the order is confirmed by the customer.
CreateAsset	This allows the creation of asset line items from the order line items.
AcceptOrder	Accept Order API is used to finalize a draft order when the customer confirms the order. Accept order API performs the following functions: • If **Auto Activate Order** = False • Order and Order Line Item status is set to 'Pending' • Asset Line Items are created in 'Pending' status • If **Ready for Billing Date** is set, billing schedule generation is initiated • If **Auto Activate Order** = True • Order and Order Line Item status is set to 'Activated' • Asset Line Items are created in 'Activated' status If 'Ready for Billing Date' is set, the billing schedule generation is initiated Order line item activation on Accept Order or QuoteInitiate logic for order line item activation, which will activate all the line items as well as order header. It will also create and activate assets. • INDEPENDENT LINE ITEM: If ready for activation date is set on the order line item and status of the order line is in “In Amendment” or “Draft”, then the system will mark the line item as “Fulfilled” and initiate “order line item activation logic • BUNDLES OR MULTI-CHARGE TYPES WHEN Create Asset on Order Activation = TRUE If ready for activation date is set and status of the order line is in “In Amendment” or “Draft”, then the system will mark the line item as “Fulfilled”. Initiate activation logic, if the current fulfilled item is the last item in the bundle or multi-charge items • BUNDLES OR MULTI-CHARGE TYPES WHEN Create Asset on Order Activation = FALSE If ready for activation date is set and status of the order line is in “In Amendment” or “Draft”, then the system will mark the line item as “Fulfilled”. Initiate activation even if there are other items in the bundle or multi-charge types that are still NOT in “Fulfilled” status

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

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

Creating Direct Orders for Accounts

Customer service representative or telesales person can directly create an order for a given account rather than going through the quoting process. Customers typically request for creating orders directly instead of going through the quote creation process in the following scenarios:

Request for Order Creation	Detail
Channel partners placing orders against channel price list.	Channel partners (Retailers, distributors) generally have a standard channel price lists. Channel partners can call customer service/telesales to place new orders.
Customers requesting new Orders at a standard price list.	Customers can call customer service/telesales to place new orders against the standard price list.
Order against pre-negotiated agreement/rate card/price list.	Customer can place orders against already negotiated price list, rate card, or agreement. In this case, orders will be priced based on the pre-negotiated price.
Add-on/change orders for previously purchased products.	Customers can place add-on orders, change orders, or renewal orders against previously purchased products / services/subscriptions.

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

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

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

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

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

Configuring and Pricing Orders

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

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

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

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

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

Finalizing Configurations

You can Finalize Configuration/ or Create Order Line Items from the cart.
You can create Order Line Items from Cart Line Items using one of the following options:

- Synchronize cart line item
- Finalize Cart

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

Confirming Orders

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

- If **Auto Activate Order** = False
  - Order and Order Line Item status is “Pending”
  - Asset Line Items are created in “Pending” status
  - 'Accept' action is no longer available

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

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

Legal Entity on Order Line Item

Order Management supports ‘Legal Entity’ at the order level to enable billing and revenue recognition by related legal entities. Order Management also passes the legal entity information to the assets generated from activated order line items.

The Legal Entity field on the Order Detail page links an asset to a legal entity. When an order is generated on quote acceptance and if the quote has a valid value for legal entity, the legal entity is copied from the quote to the order. When an order is generated on agreement activation and if the agreement has a valid value for legal entity, the legal entity is copied from the agreement to the order. On activation of order line item, the legal entity is updated on the asset line item from the order.

Cloning an Order

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

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

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

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

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

Clone order API supports the following behavior:

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

For more information on the SOAP API, see *Order Management on Salesforce Spring 2019 SOAP API Guide*.

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

Creating Partial Orders from Customer Price Agreement (Quote/Contract)

You can create partial orders from Quote/Contract (with Intent=Price Agreement i.e. when contract price list is generated from Quote/Agreement). This feature allows you to:

- Select one or more line items and the subset of quantity
- Select items from one or multiple quotes or contracts
- Track committed quantity and ordered quantity
- Track compliance

User flow

1. Click **POPriceAgreement** tab, which takes you to the angular page where you see the list of quotes/agreements whose intent=price agreement.
2. Once you view the list of quotes/agreements, select Proposal or Agreement ID to go to agreement line details page.
    a. On agreement line details screen, **Create Partial Order** button is disabled.
3. Enter the Qty to Order. Once you enter the **Qty to Order**, **Create Partial Order** button is enabled.
4. Click **Create Partial Order**.
    a. This displays the agreement order header screen which details information from the agreement details page.
    b. The fields displayed are dynamic and can be configured using order system properties. *For more information, refer to **Generating Partial Orders from Quote or Agreement** section in Order Management on Salesforce Administrator Guide.*
    c. Once the order is created, you can view a new tab of Order List on the line item page.

For detailed information, refer to the sub-sections of this topic.

View List of Quotes/Agreements

This feature enables you to view the list of quotes or agreements from price agreement.

View List of Quotes/Agreements

You can view the list of quotes/agreements where intent=Price Agreement. Fields are dynamically displayed as per the custom settings in Order System Properties.

To view the list of quotes

Click **POPriceAgreement** tab.

- This takes you to the angular page where you see the list of quotes/agreements whose intent=price agreement.
- The columns on Price Agreements are configurable.

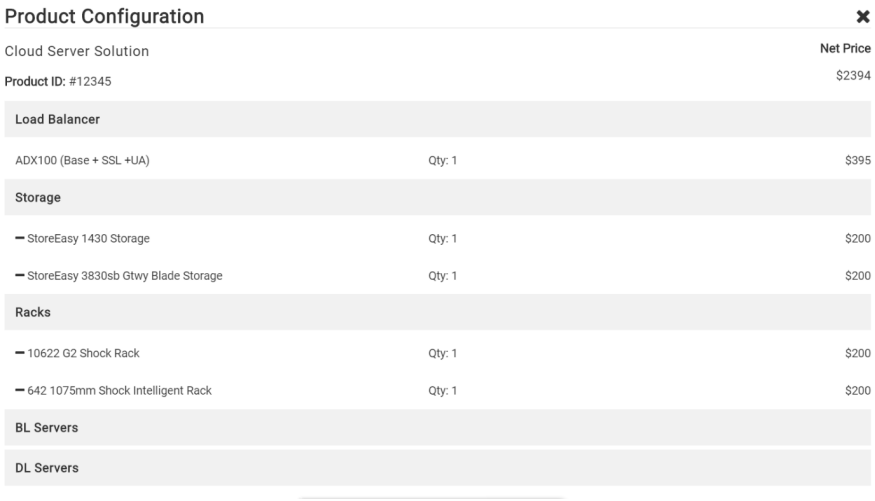
Copyright ©2011-2019 Apttus Corporation. All rights reserved.

View List of Line Agreements from Price Agreements

To view list of line items from price agreements

1. Click **POPriceAgreement** tab.
    a. This takes you to the angular page where you see the list of quotes/agreements whose intent=price agreement.
    b. The columns on Price Agreements are configurable.
2. Click **Proposal/Agreement ID**. The list of line items from price agreements is displayed.

On the price agreements details page, you can view only the parent-level bundle products or stand-alone products but not the options-level bundle products. You can use the wrench icon to view the product configuration details of the bundle.



Create Partial Orders

To create partial orders

1. Click **POPriceAgreement** tab.
    a. This takes you to the angular page where you see the list of quotes/agreements whose intent=price agreement.
    b. The columns on Price Agreements are configurable.
2. Click **Proposal/Agreement ID**. Price agreements page is displayed.
3. Enter the **Qty to Order**. Once you enter the **Qty to Order**, **Create Partial Order** button gets enabled.
4. Click **Create Partial Order**.
    a. The priceagreement page is displayed.
    b. The fields displayed are dynamic and can be configured using order system properties.
    c. The fields for which values are configured are auto-populated in read-only mode.
5. Enter the values for **Basic fields** and **Additional fields**.
6. Click **Create Order**. This action returns to line item page with a new tab of Order List.

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

Rollup Order Line Item Information to Agreement Line Item

Information is rolled up from the order line items to the agreement line items when the partial order is created from the agreement/proposal. For example: Whenever there is a change in the ordered line item for a given agreement line item, the Ordered Quantity is updated. If there is 1 ordered line item for a given agreement line item, the Ordered Quantity is 1. As per this feature:

- Quantity from the order line item is rolled up to the ordered Quantity on the proposal line item.
- Fulfilled quantity is rolled up from the order line item to the fulfilled quantity on the agreement line item when the fulfilled quantity is updated on the order line item
- Fulfillment status is updated on the agreement line item when the fulfilled quantity is updated on the order line item as stated below:

    a. Fulfilled Quantity = 0: Not Fulfilled
    b. Fulfilled Quantity < Quantity and > 0 : Partially Fulfilled
    c. Fulfilled Quantity >= Quantity: Fulfilled

- Order line items in all status except (Cancelled, Superseded, Being Amended, Being Cancelled) are rolled up.

Prerequisite: Order line item should be linked to the Agreement/Agreement Line item.

Rollup Order Line Item Information to Quote Line Item

Information is rolled up from the order line items to the quote line items when the partial order is created from the quote/proposal. For example: Whenever there is a change in the ordered line item for a given quote line item, the Ordered Quantity is updated. If there is 1 ordered line item for a given quote line item, the Ordered Quantity is 1. As per this feature:

- Quantity from the order line item is rolled up to the ordered Quantity on the proposal line item.
- Fulfilled quantity is rolled up from the order line item to the fulfilled quantity on the quote line item when the fulfilled quantity is updated on the order line item
- Fulfillment status is updated on the quote line item when the fulfilled quantity is updated on the order line item as stated below:

    a. Fulfilled Quantity = 0: Not Fulfilled
    b. Fulfilled Quantity < Quantity and > 0 : Partially Fulfilled
    c. Fulfilled Quantity >= Quantity: Fulfilled

- Order line items in all status except (Cancelled, Superseded, Being Amended, Being Cancelled) are rolled up.

Prerequisite: Order line item should be linked to Quote/Quote Line item.

Creating Partial Order from Agreement Enhancements

Order Management enables a sales representative, customer, or customer service representative to generate partial orders from agreements. When a partial order is generated, product attributes and related line item information from negotiated product configurations on the price agreements (quotes or contracts)

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

are carried to the generated order line items. This feature enables users to create a partial order directly using MAX or the self-service interface of the mobile device. Users need to provide only the key information for the order line items.

The attributes are copied from a source line item (quote/proposal or order) to a target order line item as follows:

- Quote/Proposal to order: When attributes are present on the quote/proposal line items, the order is created from the proposal, and CopyBundleConfigurationFromSource = true, the attributes are copied to the order line items.
- Agreement to order: When attributes are present on the agreement line items, the order is created from the agreement, and CopyBundleConfigurationFromSource = true, the attributes are copied to the order line items.

After the partial order is created, users can view the related items, attributes under the respective order line items.

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

Managing In-flight Order Changes and Cancellation

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

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

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

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

For details on the workflows, see Order Management Workflows.

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

Changing an In-flight Order

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

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

Amend Order

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

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

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

You can do the following using this feature:

- Allows you to change the start date or end date of subscription on one or more order line items that are in "Pending", "In Fulfillment", or "Partially Fulfilled" status.
- Allows you to make subscription date changes on the standalone item, bundles, and multiple charge line items.
- The change in subscription start and/or end date will recalculate the price for the line item or bundle after the changes are applied

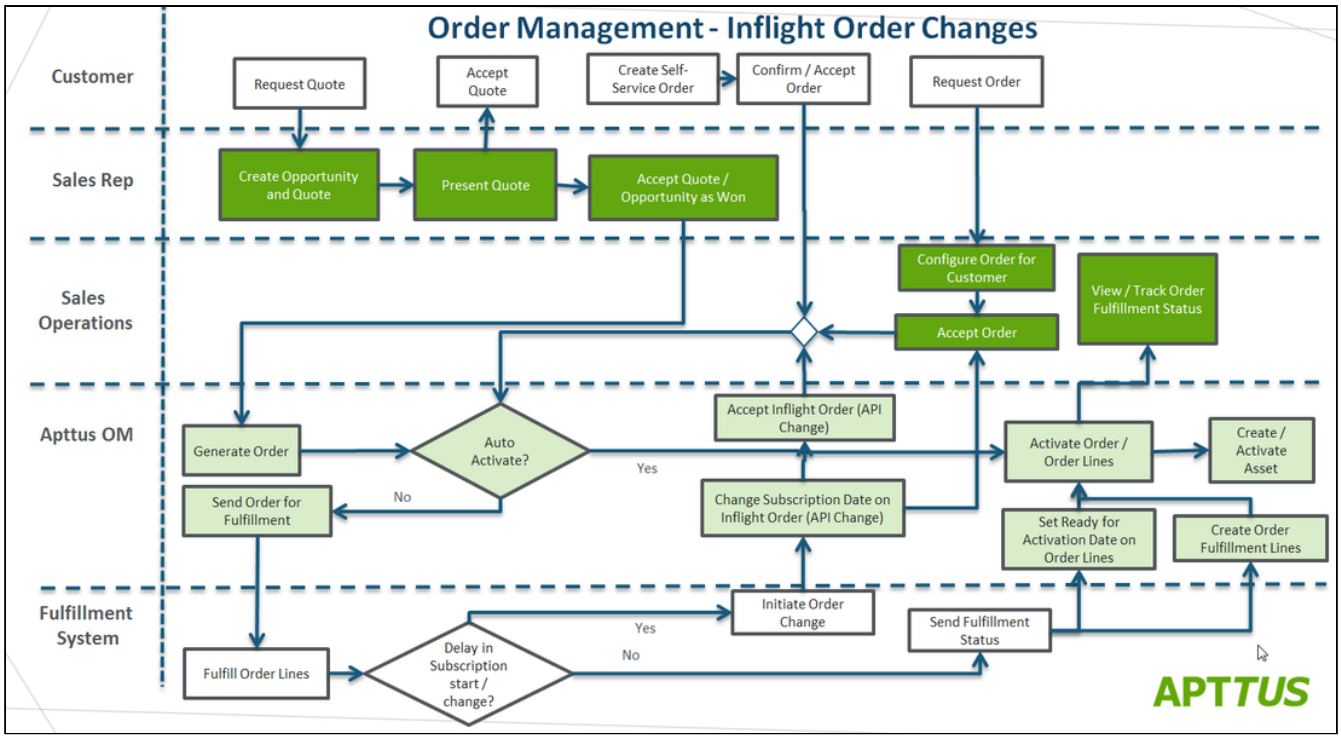
Copyright ©2011-2019 Apttus Corporation. All rights reserved.

- The changes to the order line items are also reflected in the corresponding assets.
- When In flight order change capability is enabled, assets are only created on activation of the order line item.
- Order line items that are added from catalog (line status = "New") or created through ABO actions (line status In "Amended", "Cancelled", "Renewed", "Upgraded") can be amended.
- Any order configured directly or generated from quote or eCommerce can be amended.
- Amending an order creates a new version of the order to make and track changes and has reference to the previous version. The previous version of the order and order line items are "Superseded", once the work-in-progress (In Amendment) changes are confirmed on "Accept" of the "In Amendment" order.

Undo Amend Order

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

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



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

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

Order System Properties

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

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

New UI for Amend Order

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

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

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

Label: Can be Anything as per the user's preference

Name: Can be Anything as per the user's preference

Display Type: Detail page button

Behavior: Can be Anything as per the user's preference

Content Source: URL

URL Syntax:

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

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

Versioning of an Order

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

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

- **Previous Version**: This is the previous version of respective order record before the change (Amendment/Cancellation) was made to the respective order.
- **Next Version**: This is the older version, which is updated or copied as a result of amendment/ cancellation on the respective order.

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

- **Original Order Number**: This is the Order Number that is associated with an order record, which was placed for the first time.
- **Version Number**: This is the version number that is associated with the respective order.

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

Cancelling an Order

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

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

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

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

For details on the workflows, see Order Management Workflows.

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

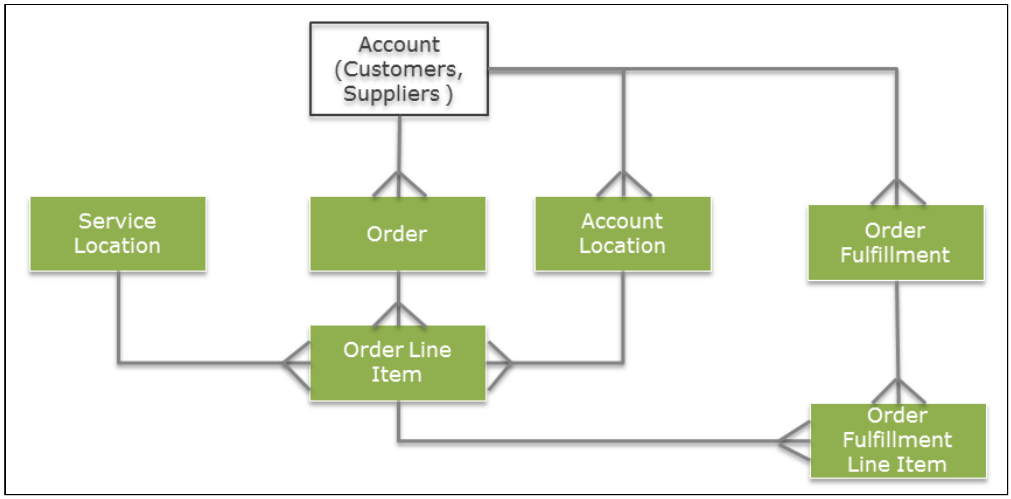
Copyright ©2011-2019 Apttus Corporation. All rights reserved.

Working with Distributed Order Fulfillment

Order fulfillment refers to the order life cycle process from the time the order is confirmed by the customer to the time the order is completed/activated. This includes the following key processes:

- Order release to fulfillment systems
- Order fulfillment status tracking with Partial Order Fulfillment
- Order and Order Line Item activation

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



Data	Details
Account Location	Specifies the buyer's location where the products or services are installed.
Service Location	Specifies the warehouse, plant, factor, fulfillment center, service center of the seller from which the products or services are delivered.
Order Fulfillment	Order Fulfillment captures the details of the fulfillment coming from the fulfillment systems. A given fulfillment is for one or more orders for a given account for fulfillment completed on a specified date.
Order Fulfillment Line Item	Order Fulfillment Line item captures the quantity fulfilled against a given order line item. This is the information provided by the fulfillment systems and is used to track the total quantity fulfilled against the order line item. A given order line item can have multiple order fulfillment line items across one or more order fulfillment.

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

Order Release to Fulfilment Systems

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

You can use the field **Service Location** on the Order Line Item to track from which warehouse or fulfillment location the order will get fulfilled. Provide the value for Service Location manually on the Order Line Item or using workflow rules.

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

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

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

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

Partial Order Fulfillment and Tracking

Apttus Order Management supports Partial Order Fulfillment. Accordingly, Order activation and related activities can be controlled at different levels such as,

- The entire order is activated and fulfilled as a whole.
- Some of the line items in the order are activated while other line items are still undergoing fulfillment.
- Individual line items are partially fulfilled at different times i.e. part of the quantity for a given order line item is fulfilled and tracked as partially fulfilled.

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

Scenarios for Partial Order Fulfillment:

- Company X receives an Order for 40 'platinum configuration' servers. The warehouse has only 30 units available. In this case, the Order is partially fulfilled with 30 units ready for delivery.
- A company producing Automobile spare parts has two production units for its products. It receives an Order for 10 different products. Since each product is manufactured at a different time in the production unit, the Order is fulfilled as and when the products complete the production process from start to finish.

Flow of Data

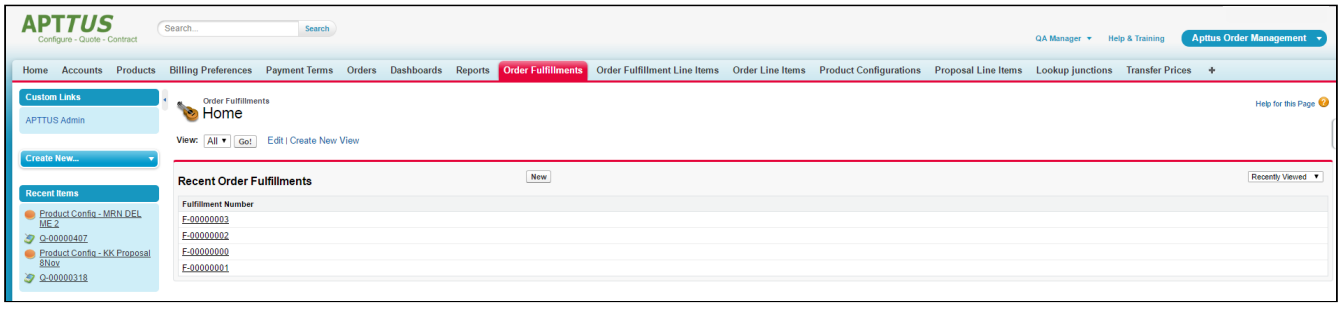
Once the Order and/or order line items are ready for fulfillment, the fulfillment process can start. As the order line items are fulfilled, you can add the information on the fulfilled quantity to the corresponding line items by creating **Order Fulfillment Line items**. The total fulfilled quantity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

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

Order Fulfillment

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

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



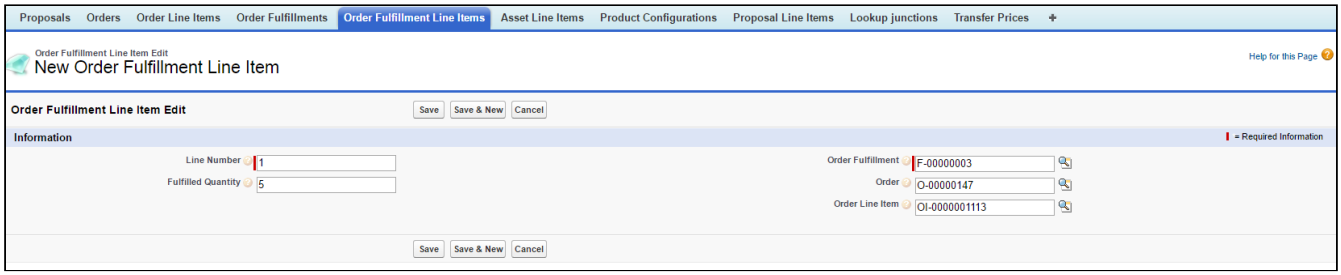
As Apttus Order Management supports Partial Fulfilment, all Order lines from given order do not need to be fulfilled for given order fulfillment. One order can be fulfilled through multiple order fulfillment.

Order Fulfillment Line Items

Order fulfillment line items are created based on the input from the fulfillment systems as the order line item quantity is fulfilled. A given order fulfillment line item corresponds to a given order line item. It can represent the quantity fulfilled for a given order line item on a given date.

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

One Order line item can have multiple order fulfillment line items across multiple order fulfillment. The fulfilled Quantity from order fulfillment line items is aggregated for a given line item and updated on the order line item in the field - **Fulfilled Quantity**.



Order Fulfillment Line Item Lifecycle

Order Fulfillment Line Item Lifecycle covers all the stages from the time a quote or order is created to the time when the services and goods are delivered and billed. **Fulfillment in Progress** flag helps to track all the intermediate steps of Order Fulfillment Line Lifecycle. If the value of Fulfillment in Progress is false, then the Fulfilled Quantity is rolled up from the Order Fulfillment Line Item to the Order Line Item, and the tracking is stopped.

Order fulfillment line items are created based on the input from the fulfillment systems as the order line item quantity is fulfilled. A given order fulfillment line item corresponds to a given order line item. It can represent the quantity fulfilled for a given order line item on a given date.

One Order line item can have multiple order fulfillment line items across multiple order fulfillment. The Fulfilled Quantity from order fulfillment line items is aggregated for a given line item and updated on the order line item in the field - Fulfilled Quantity.

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

Activating an Order

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

- Auto Activation of Order on generation from Quote

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

- Auto Activation of Order on confirmation
  You can also auto-activate the order on customer confirmation (Accept order), by specifying the option on the order header. The **Auto Activate Order** field on the order header controls the auto-activation of orders created directly.
- Order and Order Line Item activation based on the line item fulfilled quantity
  The system initiates the activation of the Order Line Item, once the **Fulfilled Quantity** is greater than or equal to the **Delta Quantity** and the Order Line Item Status is *Fulfilled*.
  Once all the order line items are *Activated*, the corresponding order is also marked as *Activated*.
- Order line item activation based on Ready for Activation Date
  Order line items can also be activated by providing a **Ready for Activation Date** on the line item.

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

Billing for an Order

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

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

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

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

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

Use Case: Billing for Standalone Recurring product
Tier1 system sells 'SecureDevice' ($100/unit) which is billed monthly for a contract period of one year. The contract is in effect from 04/20/2016. The customer wants an invoice on 15th of every month.
Steps:

1. Add a product 'SecureDevice' with **List Price** as *$100* and **Price Type** as *Recurring*.
2. Under the Tax and Billing tab on PLI, set the **Billing Rule** as *Bill in Advance* and **Billing Frequency** as *Monthly*.
3. Create a new Billing Preference and set **Billing Cycle Start** to *Billing Day of the month.*
4. Set *Billing Day of the month* to 15th of the month.
5. Create a Quote/Proposal. Set **Start Date** as 04/20/2016 and **End Date** as 04/19/2017.
6. Add the product to your cart and **Finalize**.
7. **Present** the proposal and **Accept** it after the reviews.
8. Order and Asset are created the moment a Proposal is accepted. Activate the order.

Resulting Billing Schedules

Period Start Date	Period End Date	Ready for Invoice Date	Amount
4/20/2016	5/14/2016	4/20/2016	$83.33
5/15/2016	6/14/2016	5/15/2016	$100
6/15/2016	7/14/2016	6/15/2016	$100

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

Working with Customer Purchase Orders

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

Customer purchase orders can be used to create sales orders for long term contracts.

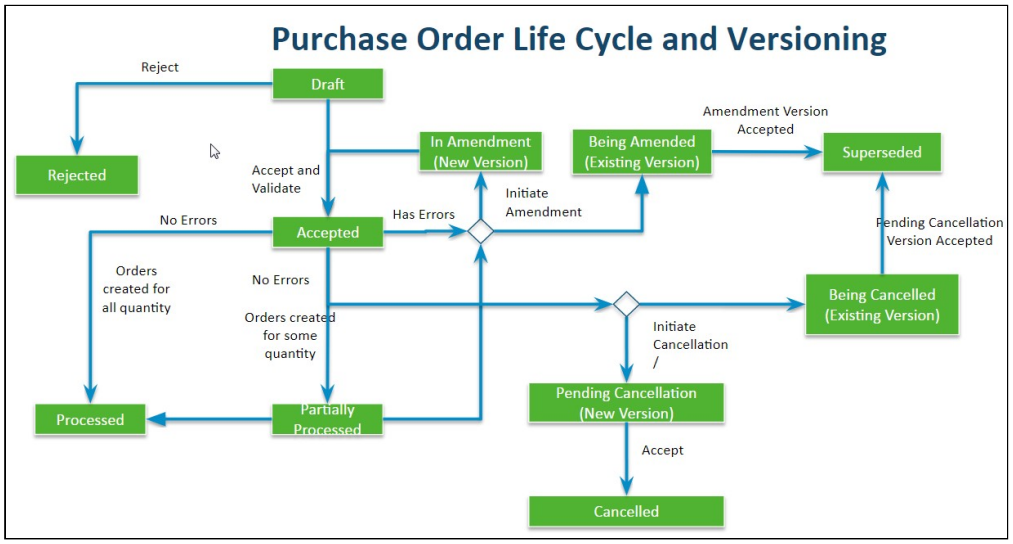
A customer purchase order workflow begins with creating a tab for Customer Purchase Orders and next creating a customer purchase order along with its line items.

To add a Customer Purchase Orders tab

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

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

- Customer Purchase Order and PO Item Status Mapping
- Creating Customer Purchase Orders
- Confirming or Accepting Draft Customer Purchase Orders
- Amending Customer Purchase Orders
- Cancelling Customer Purchase Orders
- Adding Attachments and Viewing Activity History
- Managing Customer PO
- Managing CPO Validation and Enrichment Rules



The following table describes the feature enhancements:

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

Function	Description
Capture Customer Purchase Orders	• Capture raw purchase orders from customers • Add PDF or Email as attachments to Customer POs
Manage Validation / Enrichment Rules	• Create and manage rules to validate, match, and enrich PO • Add PO items against customer's existing contracts, Quotes, and other master data
Validate PO against Quotes/Contracts	• Validate or enrich PO and PO items against customer's existing contracts, Quotes, or other master data
PO Exception or Issue Logs	• Capture errors or issues identified during data validation and enrichment of customer PO and PO Items
View PO header and line item validation issues	• View data validation issues for header and line items
Fix data validation and match issues	• Allow users to fix data validation or matching issues • Maintain version history of changes for audit trail
Create or Generate Sales Orders	• Convert the PO to a single sales order • Auto convert PO to multiple sales orders based on split criteria • Create partial orders from a PO
Amend or Cancel Inflight Customer PO	• Amend in-flight PO to add a line, change lines, cancel lines • Cancel in-flight PO
Track orders and fulfillment against PO	• Track ordered quantity by PO items • Track fulfilled quantity by PO items

Customer Purchase Order and PO Item Status Mapping

Following table describes the mapping between Customer Purchase Order and PO Item statuses:

PO Status	PO Item Status
Draft	• All items are in *Draft* status.

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

PO Status	PO Item Status
Accepted	• All items are in *Accepted* status and Customer PO is not in *In Amendment* status. • One or more items are in *Accepted* status while remaining items are in *Cancelled* status and Customer PO is not in *In Amendment* status. • PO Items and header may have errors.
Partially Processed	• Any one item is in *Partially Processed* status and Customer PO is not in *In Amendment* status. • One or more items are in *Processed* status while remaining items are in *Accepted* status and Customer PO is not in *In Amendment* status.
Processed	• All PO items are in *Processed* status. • One or more items are in *Processed* status while remaining items are in *Cancelled* status.
Rejected	• All PO Items are in *Rejected* status. • PO Items and header may have errors.
In Amendment	• PO Is explicitly amended and the current version is the latest one. • PO items can be in “Draft”, “In Amendment”, “Pending Cancellation”, “Cancelled”, “Partially Processed”, or “Processed” statuses. • PO Items and header may have errors.
Pending Cancellation	• All PO Items are in *Pending Cancellation* status.
Cancelled	• All PO Items are in *Cancelled* status.
Being Cancelled	• Next version exists in *Pending Cancellation* status.
Being Amended	• Next Version exists in *In Amendment* status.
Superseded	• Next version in *Accepted* status.

Creating Customer Purchase Orders

To create a customer purchase order

1. Navigate to **Customer Purchase Orders** tab.
2. Click **New**.

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

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

To create a Customer PO Item

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

> ⓘ You can clone the customer purchase orders by deep clone, which is **Clone Order with Items**. The cloned PO and its line items remain in **Draft** state.

To create a customer purchase order using the Angular UI

1. Navigate to **Customer Purchase Orders** tab.
2. Click a Purchase Order to open Customer Purchase Orders details page.
3. Click Manage Customer PO. The dashboard for **Customer Purchase Orders List** is displayed. The columns are configurable through fieldsets in the settings.
4. Click **New Purchase Order.**
5. Enter **Price List**, **PO Date**, **Customer Purchase Order Detail**, **Account/Contact**, and **Bill To/Ship To** information.
6. Specify **Contract Number**, **Quote Number**, **Account Name**, **Contact**, **Contact Phone**, Bill to and Ship to account details, and reference fields to store the IDs.
   The **Account Reference** is the record id that comes from an external system.
7. Add **Requested Delivery Date**.
8. Click **Save & Add Products**. The **PO Number** is autogenerated. The **Status** of Customer Purchase Order is *Draft.*
9. Once the purchase order is created, click **Add/Edit Line Items** to modify existing purchase order line items or add new line items to customer purchase order.

> ⚠ You can **Add/Edit Line Items** only when purchase order is in **Draft** or **In Amendment** state.

Confirming or Accepting Draft Customer Purchase Orders

After you create a customer purchase order, the status of PO and its line items changes to **Draft**.

To accept the customer purchase order in the draft state

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

1. Click **Accept** in the **Customer Purchase Order Detail** section.
   The status of customer PO and its line items changes to **Accepted** and Validation Error, Number of errors, and Number of Warnings fields get updated if there are any errors with the given CPO.

   ⚠ When the status of CPO is *Accepted*, the **Create Single Order** button is enabled for creating one order.

   ⓘ **Validated** and **Validation Errors** status provided in the **Status** drop-down list is meant for PO while other statuses are common to general orders. For more information, refer to Customer Purchase Order and PO Item Status Mapping.
   You can see the details about validation in the **Validation Errors?**, **Number of Errors**, and **Number of Warnings** fields in order to proceed with mitigation action. If these fields are not displayed in the header, Edit Layout and add them in the page.
   For more information about field level settings, see *Order Management on Salesforce Administrator Guide*.
2. Change the status of PO and its line items manually to **Validated** after validation.
   The **Accept** button is enabled when the PO is in **Draft**, **In Amendment**, or **Pending Cancellation** states.

Amending Customer Purchase Orders

The amendment is allowed only when customer purchase order status is in an **Accepted** or **Partially Processed** state.

To amend a customer PO

1. On the Customer Purchase Order page, Click **Amend Order**.
   - The **Status** of PO changes to **In Amendment**.
   - The **Accept** button is enabled.
   - A new version of the PO is created.
   - The status of previous version changes to **Being Amended**.
2. Add, Edit, or Delete a PO Item as required. For details, refer to Creating Customer Purchase Orders.
   You can add a new PO item or edit the quantity of an existing PO item as appropriate.
3. Click **Accept**. The status of the PO and its line items changes to **Accepted**. The status of previous version changes to **Superseded**.

Reverting In-Amendment Customer Purchase Orders

You can revert the changes that you made to the customer purchase order by using **Undo Amend Order** functionality. You can revert only **In Amendment** CPOs.

To undo amend a customer PO

1. On the Customer Purchase Order page, Click **Undo Amend Order** for the customer PO, which is **In Amendment** and not yet accepted.
   - The changes made to customer PO and its line items are rolled back to the old version.

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

- The **Status** of old customer PO and its line items changes to **Accepted**.

Cancelling Customer Purchase Orders

Cancellation is allowed only when customer purchase order status is in **Validated** or **Validation Errors** state.

To cancel a customer PO

1. On the Customer Purchase Order page, Click **Cancel Order**.
   - The **Status** of PO and its line items changes to **Pending Cancellation**.
   - The **Accept** button is enabled.
   - A new version of the PO is created.
   - The status of previous version changes to **Being Cancelled** and the status of PO items remains **Accepted**.
2. Click **Accept**. The status of PO and its line items changes to **Cancelled**. The status of previous version changes to **Superseded**.

Reverting Cancel Customer Purchase Orders

You can revert the changes that you made to the customer purchase order by using **Undo Cancel Order** functionality.

To undo cancel a customer PO

1. On the Customer Purchase Order page, Click **Undo Cancel Order** for the customer PO, which is **Pending Cancellation** and not yet accepted.
   - The changes made to customer PO and its line items are rolled back to the old version.
   - The **Status** of old customer PO and its line items changes to **Accepted**.

Adding Attachments and Viewing Activity History

To add notes and attachments

1. On the **Customer Purchase Order** page, go to **Notes & Attachments** section and click **Attach File**.
2. Click **Choose File** to select a document on the next page. For example, PDF.
3. Click **Attach File** to attach the selected document
4. Click **Done**. The document is attached. You can view, edit, and delete the attachment.

To view activity history

1. On the **Customer Purchase Order** page, go to **Activity History** section.
   After you create a customer purchase order, Apttus Order Management keeps a track of your activities in the **Activity History** section.

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

Managing Customer PO

You can use the **Manage Customer PO** button available in the **Customer Purchase Order Detail** page on the Salesforce Classic UI.

To create sales orders using the Angular UI

- Click **Manage Customer PO** on the CPO page. On the top right you can see the options to **Create Single Order**, **Split Multi Orders**, or **Create Partial Order**. These options are enabled after the CPO is in the **Accepted** state. Also, resolve any errors before creating the sales orders. For more information, refer to Mitigating Data Validation Issues.

You have three ways to create sales orders as follows:

- You can create a single order for the whole customer PO.
- You can select the fields by performing Group by operation on the PO items. For example, Group by the PO line items by the contract numbers.
- You can create partial orders from the PO items.

ⓘ For more information about creating orders from Customer Purchase Orders APIs, refer to *Order Management on Salesforce SOAP API Guide*.

Creating a Single Order

This feature helps you to **Create Single Order** from a given purchase order.

To create a single order

1. On **Customer Purchase Order** details page, Click **Create Sales Order>Create Single Order**.
    - The Order is generated under **Sales Orders** tab.
    - The status of the sales order generated from customer purchase order is updated to **Pending**.
    - The status of the purchase order is updated to **Processed**.

Creating Multiple Sales Orders

This feature helps you to split customer purchase order into multiple orders based on different split criteria, such as
POLineNumber,
Quantity, **NetPrice**, **Status**, **EndDate**, **RequestedDeliveryDate**, **StartDate**, **ChangeStatus** and so on.

To create multiple sales orders

1. Click **Split Multi Orders** menu option on the top right. The **Create Multiple Sales Order** screen opens.
2. Select the **Split Criteria** for creating orders. For instance, Status, Quantity, Net Price field. It is mandatory to define criteria by selecting fields to group by with. Apttus Order Management displays a message at the end about the number of sales orders grouped by fields will be created.
3. Click **CreateSalesOrder** for generating orders grouped by fields that you selected.

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

Creating Partial Orders

To create partial orders

1. Click **Create Partial Order** menu option on the top right. The **Create Sales Order-enter the quantity** screen opens.
2. Select an individual PO item and specify the **Process Qty** in order to create partial orders using the **Quantity**. For example, you can select Process Qty = 1 as opposed to the total Quantity of 2.
3. Click **CreateSalesOrder** for generating orders for each PO item.

Managing CPO Validation and Enrichment Rules

You can configure the Data Validation and Enrichment Ruleset at the object level for Customer PO.

Data Enrichment Rules

You can use these rules to enrich the data. For example, the PO item account must be the same as of Proposal Line Item or Source Object Account. You can define the data enrichment rule in order to input this data whenever you create a customer purchase order instead of feeding this data manually.

Data Validation Rules

You can have the data validations in place for purchase orders or its items so that whenever you specify the values for quantity or fulfilled quantity, a data validation rule is triggered to ensure that the values fall within the specified limits. You can have two types of validations, namely Warning and Error.

- Warning

This type of data validation rule allows you to continue the operation despite the system warning. However, it warns you to take precaution while creating sales orders.

- Error

This type of data validation rule does not allow to bypass the error and stops the operation until you mitigate the error before continue creating the sales orders.

Creating Rulesets

You can create and update the data validation and enrichment rulesets.

To create a Ruleset

1. On the **Data Validation/Enrichment Rulesets** tab, click **New**.
2. Specify the mandatory field information such as **Ruleset Name**, **Sequence**, and **Currency**.
3. Also provide additional field information as appropriate.

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

4. Click **Save**.

> Make sure that you select the **Active** checkbox for enabling the ruleset.

Data Enrichment process involves mapping the data objects between sources and targets, which is achieved through a set of rules.

To configure the filter criteria for Target Objects to trigger rules

- Select the **Field**, **Operator**, and **Value** for defining filter criteria.

For example, **Status in Draft**. In this case, whenever the system finds a status in the draft state, this rule is triggered for the CPO.

To configure the match criteria for source and target objects to enable mapping

- Select the **Field**, **Operator**, **Map To**, and **Value** for defining match criteria.

For example, you want to enrich data in CPO using Proposal Line Item, then provide the following details:

- Field **Line Item Id** (field of the proposal line item)
- Operator **equal to**
- Map To **Customer PO Item**
- Value **Contract Item Number** (field of the CPO Item)

> - **Target Object to Validate** is the object that you want to enrich and validate. For instance, CPO, Customer PO Item.
> - **Target Object Parent** is the parent for Customer PO Item, which is CPO.
> - **Source Data Object** is the object from which the system extracts the value to enrich the PO or PO Item. For example, Quote/Proposal, Proposal Line Item, Agreement, Agreement Line Item, Order, or Order Line Item.

Creating Rules

After you create and configure a ruleset, you can create a corresponding rule for it.

To create a Data Enrichment Rule

1. Under a ruleset, click **New Data Enrichment Rule**.
2. Specify the values for **Target Object Field**, **Source Object Field, Required?, Message,** and **Description** field.
   The Ruleset and Currency fields are autoselected. The Rule Id is autogenerated.
3. Click **Save**.

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

To create a Data Validation Rule

1. Under a ruleset, click **New Data Validation Rule**.
2. Specify the values for **Target Object Field**, **Source Object Field, Match Operator, Error Type, Message,** and **Description** field.
   The Ruleset and Currency fields are autoselected. The Rule Id is autogenerated.
3. Click **Save**.

Mitigating Data Validation Issues

Apttus Order Management displays the data validation messages based on the data validation rules that you set while configuring a ruleset.

For example,

If you have set proposal item quantity cannot be greater than PO Item quantity, then after the data validation rule is executed, Apttus Order Management maps the target and source object fields for quantity.

Depending on the error type that you configured in the data validation rule, a warning or an error is shown that you need to act upon in order to complete the operation.

Customer PO Issue Logs

For the In-Amendment orders, when you click **Validate Customer PO** Apttus Order Management generates all the PO related issue details in the **Customer PO Issue Logs**.

Error or Warning fields

Based on the below fields you can identify errors with your Customer PO and its items.

- Validation Errors?
- Number Of Errors
- Number Of Warnings

To fix the errors, you can go to each ruleset using the issue log and amend the CPO that are in Draft and In-Amendment states.

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

Intelligent Order Assistant (Max for OM)

Intelligent Order Assistant is a conversational interface developed using Apttus Max bot technology. It is available embedded within web applications as well as on mobile devices through channels Slack, Skype etc. This can help in various order management functions including view orders, view order details, create order, amend order, cancel order among others. There are standard conversational flows available which can be modified at the project level.

Order Management (Out-Of-the-Box) Max Flow

When User types, Hello or Hi, Max respond with the following options:

- View Orders
- View Order Details
- Create New Order
- Amend Order
- Cancel Order
- Clone Order

A user can choose an option to start the relevant conversation.

For more details, refer to Order Management Intelligent Order Assistant Integration Guide.

Copyright ©2011-2019 Apttus Corporation. All rights reserved.

Apttus Copyright Disclaimer

Copyright © 2019 Apttus Corporation (“Apttus”) and/or its affiliates. All rights reserved.

No part of this document, or any information linked to or referenced herein, may be reproduced, distributed, or transmitted in any form or by any means, including photocopying, recording, or other electronic or mechanical methods, without the prior written consent of Apttus. All information contained herein is subject to change without notice and is not warranted to be error free.

This document may describe certain features and functionality of software that Apttus makes available for use under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not, in any form, or by any means, use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part of the software. Reverse engineering, disassembly, decompilation of, or the creation of derivative work(s) from, the software is strictly prohibited. Additionally, this document may contain descriptions of software modules that are optional and for which you may not have purchased a license. As a result, your specific software solution and/or implementation may differ from those described in this document.

U.S. GOVERNMENT END USERS: Apttus software, including any operating system(s), integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are “commercial computer software” pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

Neither the software nor the documentation were developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Apttus and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Apttus and X-Author are registered trademarks of Apttus and/or its affiliates.

The documentation and/or software may provide links to Web sites and access to content, products, and services from third parties. Apttus is not responsible for the availability of, or any content provided by third parties. You bear all risks associated with the use of such content. If you choose to purchase any products or services from a third party, the relationship is directly between you and the third party. Apttus is not responsible for: (a) the quality of third-party products or services; or (b) fulfilling any of the terms of the agreement with the third party, including delivery of products or services and warranty obligations related to purchased products or services. Apttus is not responsible for any loss or damage of any sort that you may incur from dealing with any third party.

For additional resources and support, please visit https://community.apttus.com.

DOC ID: OMSFSPR19UG20190403

 Copyright ©2011-2019 Apttus Corporation. All rights reserved.