



**Order Management on Apttus
Intelligent Cloud™ Summer 2017
User Guide**

— Powered by Salesforce

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Apttus Order Management pulls revenue data, like billing schedules and order terms, directly from your quotes and contracts to ensure correct invoices every time. Easily orchestrate any type of product configuration, solution bundle or change order validating changes against contracts helping you eliminate errors and improve efficiency.

This guide takes you through,

- [Order Management in the Quote-to-Cash process](#)
- [Order Lifecycle and Status](#)
- [Order Creation](#)
- [Distributed Order Fulfillment](#)

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**.

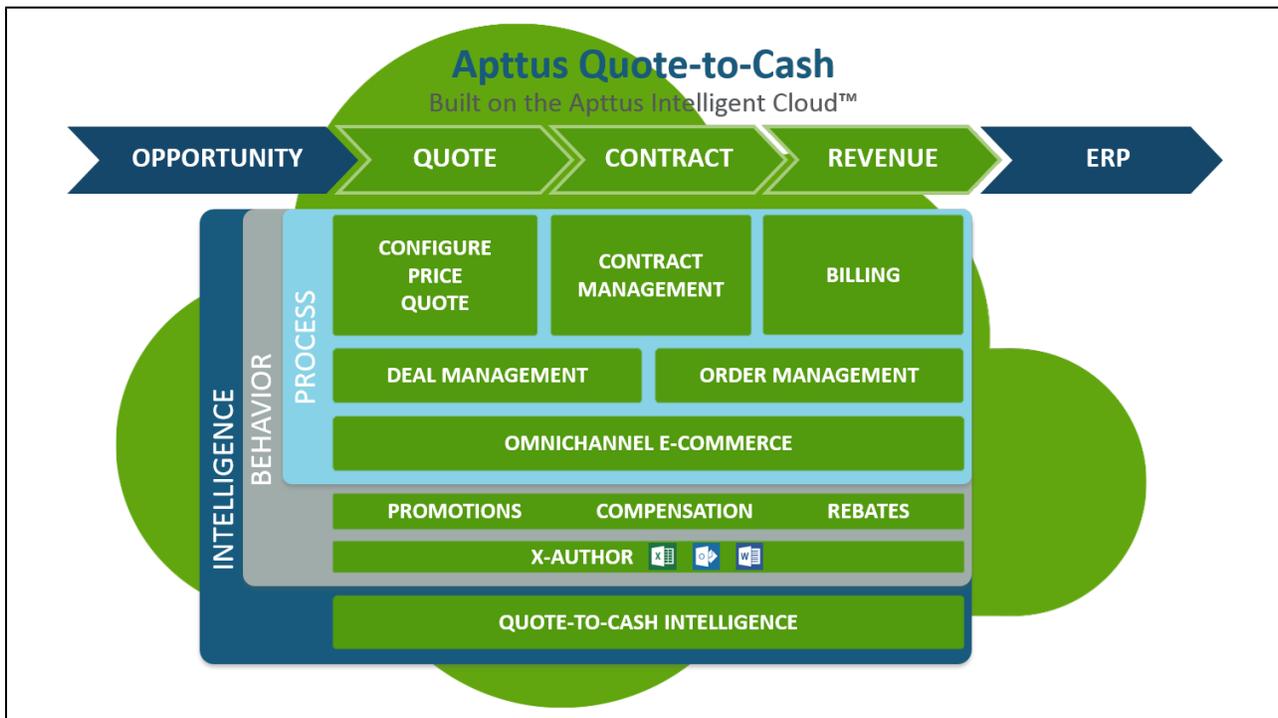
Order Management in the Quote-to-Cash process

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.



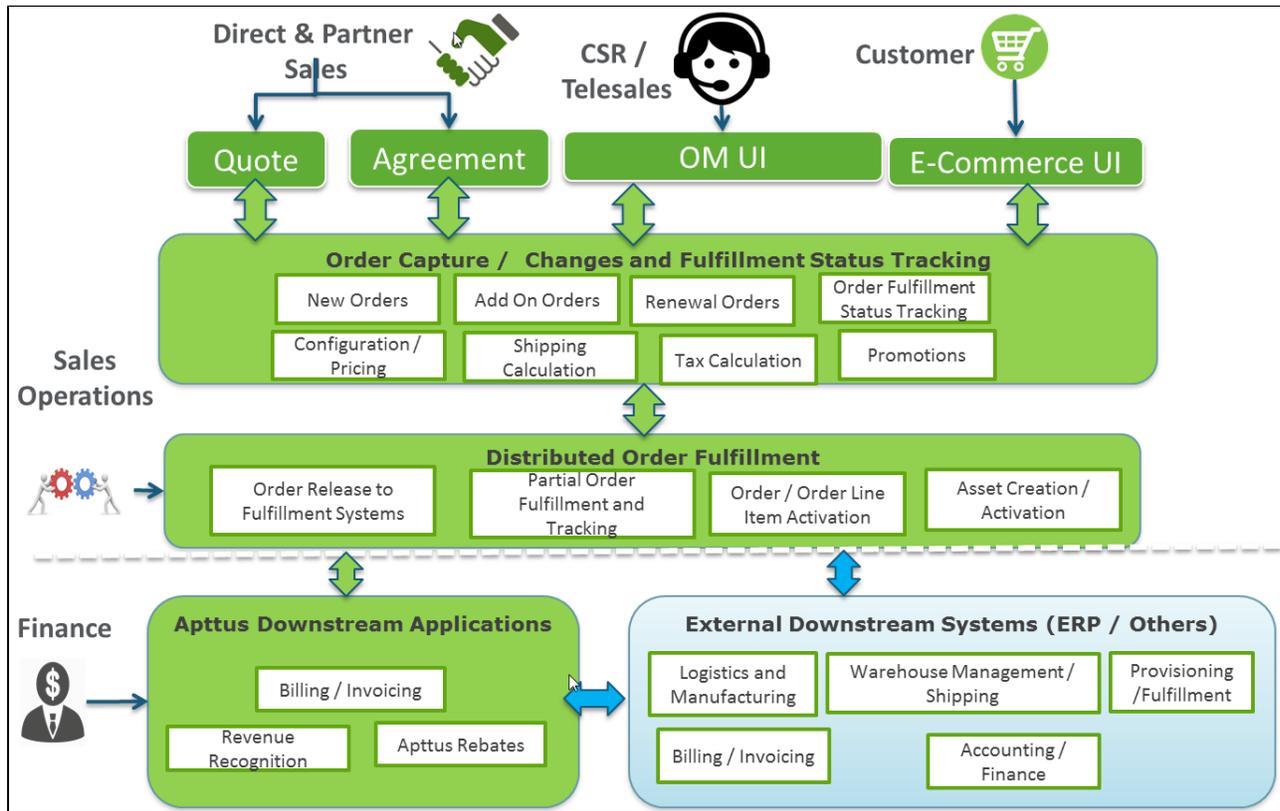
With applications in the Apttus Quote-to-Cash suite, you can

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

Overview

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 & Partner Sales and E-commerce interface. From the Order Management interface, Customer Support Reps can create Orders on behalf of the customers.

Installing the Order Management Package

Salesforce provides a simple wizard-led installation process for all Apttus packages.

Install the Apttus Order Management package from the [Apttus Customer Portal](#) > **Install Center** > **Integrations:**

Product	Latest Certified Version
Apttus Configuration & Pricing (New)	Summer 2017 (10.1298)
Apttus CPQ API	9.4.0067 (9.67)

Product	Latest Certified Version
Apttus CPQ Admin (New) (Required if you are using CPQ Admin Console)	3.48
Apttus Order Management	1.0.0000 (1.0)
Apttus Proposal Management (New) (Required if you are using Proposal Management)	8.3.0154 (8.154)
Apttus Quote/Proposal-Asset Integration	6.5.0014 (6.14)
Apttus Quote/Proposal-Contract Integration	8.0.0044 (8.44)
Apttus Quote/Proposal-Configuration Integration (New) (Required if you are using CPQ and Proposal Management)	10.0.0240 (10.240)

Note

You must have Apttus-provided login credentials to the Customer Success Portal to be able to download packages.

To install the Apttus Order Management package

1. Go to the **Install Center** within the *Apttus Customer Portal*.
2. Under My packages, select **Order Management** and click **Install Now**.

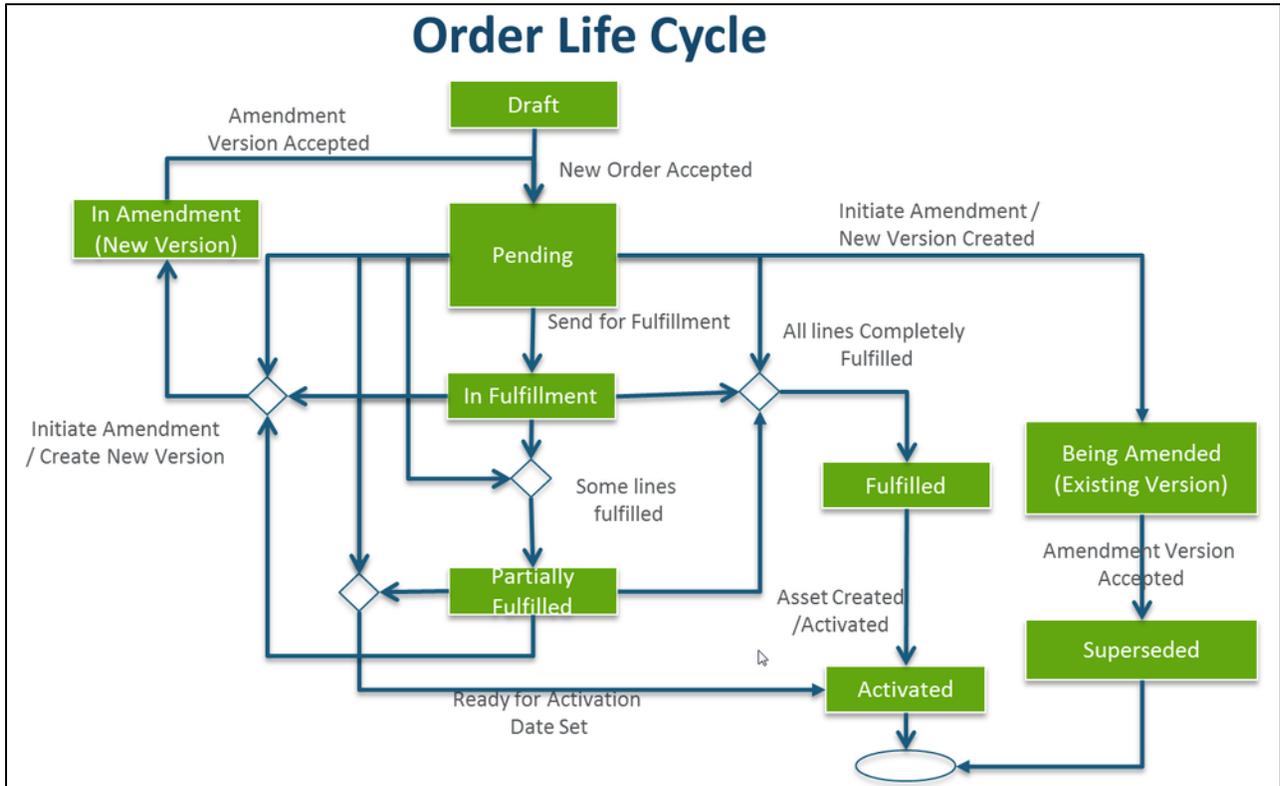
Upgrading to the Latest Order Management Package

Before you upgrade to the latest Order Management Packages do note that:

- Amend Order is not available for orders that are already “ In flight” before the upgrade.
- Existing “In flight” orders need to be processed as is and cannot be amended.

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.

Order Header Status

Order Status	Description	Event / Action
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Order Status	Description	Event / Action
Draft	When an Order is initially created, its default status is 'Draft'.	<p>New Order</p> <p>Creating a new order from the Order Page will create the Order in <i>Draft</i> status. Draft orders are work-in-progress orders and can be opened and edited without creating new versions.</p> <p>Ensure that <i>Draft</i> is the default status when creating the Order and Order line items.</p>
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'.	<p>Accept Order / Accept Quote</p> <p>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 <i>Pending</i> if Auto Activation is not enabled.</p> <p>To generate Orders in <i>Pending</i> status from Quotes, ensure,</p> <ul style="list-style-type: none"> • Auto Create Orders is set to <i>True</i> Go to Custom Settings > Proposal System Properties to apply this property. • Auto Activate Order is set to <i>False</i> Clear this flag before Accepting the Quote.

Order Status	Description	Event / Action
In Fulfillment	<p>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</p>	<p>Send for Fulfillment</p> <p>You can set the status to <i>In Fulfillment</i> when the Order and Order line items are exported to fulfillment systems to initiate the fulfillment process.</p> <p>It indicates that the order has been released to the fulfillment systems and fulfillment process has begun.</p>
Partially Fulfilled	<p>When one or more line items are in 'Partially Fulfilled' status.</p> <p>OR</p> <p>If one or more line items are IN ('Activated', 'Fulfilled') status AND one or more IN ('In Fulfillment' OR 'Pending') status.</p>	<p>Create Order Fulfillment Line Items</p> <p>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'.</p> <p>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'.</p>
In Amendment	<p>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</p>	<p>To make In-Flight order changes use the amendOrder API. This API does the following :</p>

Order Status	Description	Event / Action
	<p>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.</p>	<ul style="list-style-type: none"> • 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 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 on 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.
		<p>Amend Order</p>

Order Status	Description	Event / Action
Being Amended	<p>This status is set when an 'In flight' order (order in pending, In Fulfillment, or Partially Fulfilled) status is amended.</p> <p>This status is used with 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.</p>	Available using "amendO
Fulfilled	<p>All line items in 'Fulfilled' status</p> <p>OR</p> <p>One or more line items are IN (Fulfilled) status</p> <p>AND</p> <p>One or more line items are IN ('Activated') status</p>	NA
Activated	<ul style="list-style-type: none"> • 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 	<p>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.</p> <p>Activating All Order Line Items If all Order Line Items are independently fulfilled and activated, the entire Order will be activated.</p>

Order Status	Description	Event / Action
	When activated, system will also initiate the activation of the corresponding asset	
Superseded	This status is set on 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"

Order Line Item Status

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

Order Line Status	Description	Event / Action
Draft	An Order Line Item is initially created and the Order Status is 'Draft'.	Creating a New Order.
Pending	Order is confirmed by a customer but is Pending for validation.	Accepting Quote/Order.
In Fulfillment	The Order Line Item status changes to 'In Fulfillment' 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.

Order Line Status	Description	Event / Action
In Amendment	If the subscription dates of the order line items are modified before order activation.	<ul style="list-style-type: none"> • The changes to the order line items are also reflected on 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.
Being Amended	<p>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).</p> <p>This status is used with 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.</p>	<p>Amend Order</p> <p>Available using "amendOrder" API</p>
Superseded		Accept Order

Order Line Status	Description	Event / Action
	<p>This status is set on previous version of the order, when the order related to the "In Amendment" order line item is accepted.</p>	<p>When "Accept" action is used on an "In Amendment" order, then the previous version is "Superseded"</p>
Fulfilled	<p>If the 'Fulfilled Quantity' on the Order Line Item is equal to the 'Delta Quantity'.</p>	<p>On fulfillment of all Order Line Items. Directly updating the status of Order Line Item to 'Fulfilled'.</p>
Activated	<p>The Order Line Item can have the status 'Activated' in any of the following three scenarios:</p> <p>Scenario 1 - Line item activation is initiated once the order line item is 'Fulfilled'</p> <p>Scenario 2 - The Order is auto activated.</p> <p>Scenario 3 - The Order line item is manually activated</p> <p>As and when Order Line Items are activated, system initiates the activation of the corresponding asset.</p>	<p>On Fulfillment of all Order Line Items. Providing Ready for Activation Date on the Order.</p>

Order Capturing

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 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 E-Commerce order
- Create direct order from account

Create an Order from Quote

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.

Create E-commerce Order

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.

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	<p>Accept Order API is used to finalize a draft order when the customer confirms the order. Accept order API performs the following functions:</p> <ul style="list-style-type: none"> • 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 <p>If 'Ready for Billing Date' is set, billing schedule generation is initiated</p> <p>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.</p> <ul style="list-style-type: none"> • INDEPENDENT LINE ITEM: <p>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 system will mark the line item as "Fulfilled" and initiate "order line item activation logic"</p> <ul style="list-style-type: none"> • BUNDLES OR MULTI-CHARGE TYPES WHEN Create Asset on Order Activation = TRUE

API	Details
	<p>If ready for activation date is set and status of the order line is in “In Amendment” or “Draft”, then system will mark the line item as “Fulfilled”. Initiate activation logic, if the current fulfilled item is last item in the bundle or multi-charge items</p> <ul style="list-style-type: none"> • BUNDLES OR MULTI-CHARGE TYPES WHEN Create Asset on Order Activation = FALSE <p>If ready for activation date is set and status of the order line is in “In Amendment” or “Draft”, then 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</p>

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, please refer [API Reference Guide](#).

Create direct Order for an Account

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 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 standard price list.

Request for Order Creation	Detail
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

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.

Configure and Price Order

Configuration and pricing for an Order is 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 catalog, installed products page, or cart. You can also customize the **Configure products** button to pass additional parameters.

```
IF ( LEN( Apptus_Config2__PriceListId__c ) > 0 , HYPERLINK("/apex/Apptus_Config2__OrderConfiguration?id=" &Id & "&flow=NGDefault", IMAGE("/resource/Apptus_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.

Finalize Configuration

Finalize Configuration/Create Order Line Items from the cart.

Order Line Items can be created from Cart Line Items using one of the following options:

- Synchronize cart line item
- Finalize Cart

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

Confirm Order

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

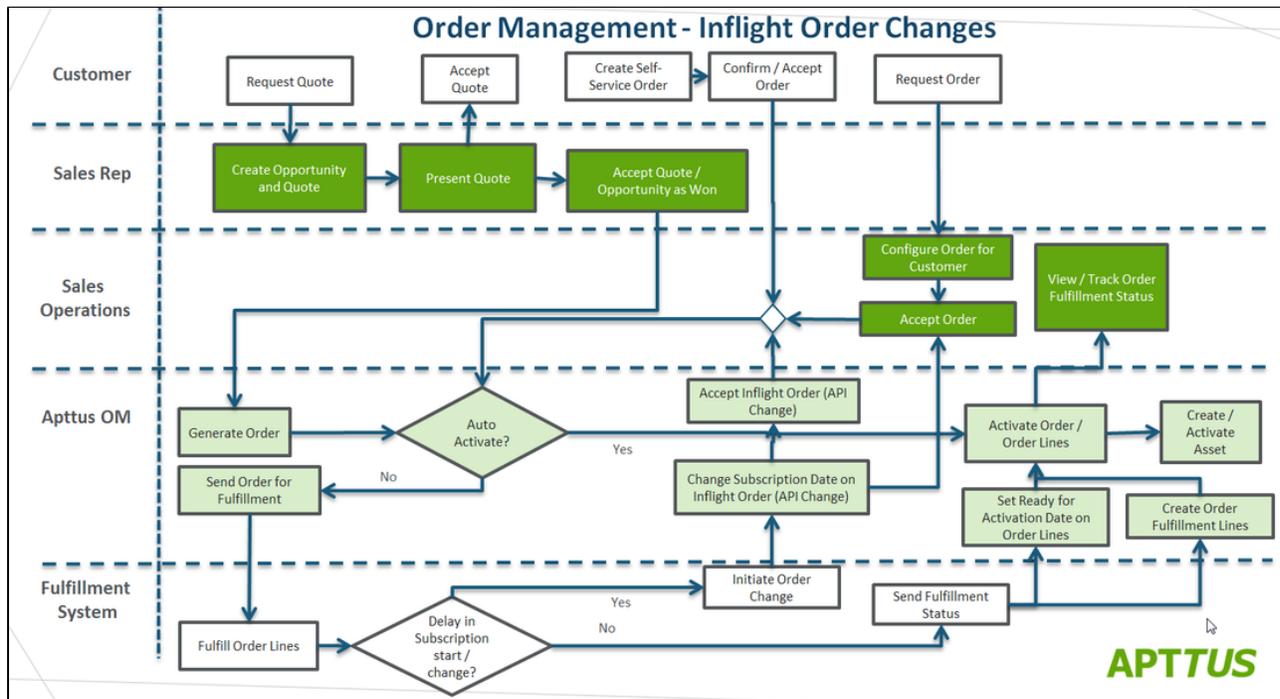
- If **Auto Activate Order** = False
 - Order and Order Line Item status is “Pending”
 - Asset Line Items are created in “Pending” status
 - 'Accept' action is no longer available
 - If 'Ready for Billing Date' is set, billing schedule generation is initiated
- If **Auto Activate Order** = True
 - Order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

Changing an In-flight Order

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



Use Cases for Changing Inflight orders

This section highlights the use cases when you would make changes to an in-flight order, For example, delay in provisioning of Subscription from a confirmed order, impacts the subscription effective dates, duration, and Price. Accordingly on provisioning, change In flight order, order line item, asset, and other related data.

<p>New Subscription</p> <p>Change in subscription dates without changing Term /Duration or Quantity</p>	<p>New subscription start is delayed by a month due to provisioning delay.</p> <p>Ordered subscription: 01-Jan-2017 to 31-Dec-2017</p> <p>Provisioned subscription: 01-Feb-2017 to 31-Jan-2018</p>
--	--

<p>Amend Subscription</p> <p>Change amendment start date without changing End Date and Quantity</p>	<p>Provisioning of an add-on order on an existing subscription is delayed by a month.</p> <p>Ordered subscription: 01-Aug-2017 to 31-Jan-2018</p> <p>Provisioned subscription: 01-Sep-2017 to 31-Jan-2018</p>
<p>Terminate Subscription</p> <p>Change termination date of subscription</p>	<p>Termination of an existing subscription is delayed by a month due to provisioning delay</p> <p>Ordered subscription Termination: End Date: 31-Oct-2017</p> <p>Provisioned subscription Termination: End Date: 30-Nov-2017</p>
<p>Swap Subscription</p> <p>Change start date of upgrade and thus change termination date of original subscription</p>	<p>Start date of upgrade of an existing subscription is delayed by a month due to provisioning delay. Accordingly, termination of existing subscription also need to be delayed</p> <p>Ordered subscription Upgrade:</p> <ul style="list-style-type: none"> •Gold Warranty: End Date: 31-July-2017 •Platinum Warranty: 01-Aug-2017 to 31-Jan-2018 <p>Provisioned subscription Upgrade:</p> <ul style="list-style-type: none"> •Gold Warranty: End Date: 31-Aug-2017 •Platinum Warranty: 01-Sep-2017 to 31-Jan-2018

Order System Properties

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

Field	Details
<p>Create Assets on Order Activation?</p>	<ul style="list-style-type: none"> •To be “True” to enable inflight order changes •When “True”, will not create an asset when the quote or order accepted in “Pending” status
<p>Initiate Billing on Order Activation?</p>	<ul style="list-style-type: none"> •To be “True” when “Create Asset on Order Activation = True”

Amend an Order API

This API is a composite API that enables you to modify or amend an order without changing the value of the order line items. For example, change the order date.

amendOrder

Parameters		
Name	Type	Description
request	Apttus_Config2.CPQStruct.AmendOrderRequestDO	The request data object.

Request Data Object - Apttus_Config2.CPQStruct.AmendOrderRequestDO		
Field	Type	Description
OrderId	ID	Reference to the order. Order id can be any one of the following <ul style="list-style-type: none"> Order in "Pending, In Fulfillment, Partially Fulfilled" status that needs to be amended Order in "In Amendment" status on which additional line item changes needs to be done
OrderItems	List	List of order line items and changes that needs to be done <ul style="list-style-type: none"> Order line item id: Reference to the order line item Start Date: New Start date for the order line item. Not needed for the order line item, if the termination date for existing subscription needs to be changed. End Date: New end date for the order line item. If the termination date needs to be changed on existing subscription then just specify new end date. Contract Numbers: If the termination date needs to be changed on existing subscription then set this value to null or same as End Date

Request Data Object - Apttus_Config2.CPQStruct.AmendOrderRequestDO		
		Only the above parameters can be passed to the order line item for the change. Only the line items in "Pending" or "In Fulfillment" status can be changed.

Response Data Object - CPQStruct.AmendOrderResponseDO		
Field	Type	Description
AmendedOrderItems	List	List of amended order items
AmendOrderSO	Standard Data Object	the fields of the AmendOrder Object.

Code Sample

The sample below enables you to amend an order for a valid order with an Order ID.

```

Id orderid = 'a2n4C000000HVQBQA4';
List<Apttus_Config2__OrderLineItem__c> lineitemlist =

    [ Select Id, Name, Apttus_Config2__StartDate__c,
    Apttus_Config2__EndDate__c from Apttus_Config2__OrderLineItem__c
    where
    Id IN ('a2k4C0000008VgR', 'a2k4C0000008VgS')];
lineitemlist[0].Apttus_Config2__StartDate__c=date.newInstance(2017, 1
0, 01);
lineitemlist[0].Apttus_Config2__EndDate__c=date.newInstance(2018, 8,
31);
/*****For
    line item, where cancellation date needs to be changed, provide the
end
    date and set Contract Numbers field to null*****/
lineitemlist[1].Apttus_Config2__EndDate__c=date.newInstance(2018, 9,
30);
lineitemlist[1].Apttus_Config2__ContractNumbers__c=null;

Apttus_Config2.CPQStruct.AmendOrderRequestDO request = new
Apttus_Config2.CPQStruct.AmendOrderRequestDO();
    
```

```

request.OrderId = orderid;
request.OrderItems = lineitemlist;
Apttus_Config2.OrderWebService.amendOrder (request);
/***** Accepting new order *****/
Apttus_Config2.CPQStruct.AcceptOrderRequestDO request1 = new
Apttus_Config2.CPQStruct.AcceptOrderRequestDO();

    Apttus_Config2__Order__c newOrder = [ Select Id, Name,
Apttus_Config2__ActivatedDate__c from Apttus_Config2__Order__c where
Apttus_Config2__PreviousVersion__c = :orderid];
    request1.OrderId = newOrder.Id;

/*
*****/ updating ready for activation date on the order or
order
line items for auto activation of the amended lines *****/

    //newOrder.Apttus_Config2__ActivatedDate__c = system.now();

List<Apttus_Config2__OrderLineItem__c> lineitemlist1 =

    [ Select Id, Name, Apttus_Config2__ActivatedDate__c from
Apttus_Config2__OrderLineItem__c where Apttus_Config2__OrderId__c =
:newOrder.Id and Apttus_Config2__Status__c = 'In Amendment'];
lineitemlist1[0].Apttus_Config2__ActivatedDate__c = system.now();
lineitemlist1[1].Apttus_Config2__ActivatedDate__c = system.now();

update lineitemlist1;

Apttus_Config2.CPQStruct.AcceptOrderResponseDO response =
Apttus_Config2.OrderWebService.acceptOrder(request1);
    
```

Order and Order Line Item Behavior on Amendment

Action	Behavior
In flight Order changes allowed	<ul style="list-style-type: none"> • Change to Start Date and/or End Date • Change the term as needed based on new start date / end date • Recalculate Net Price as needed

Action	Behavior
Order Versioning	<ul style="list-style-type: none"> • New order and order line version created to make the in flight change • Previous version superseded once new change is confirmed
Delayed Asset Creation	<ul style="list-style-type: none"> • Option added to “Create Assets on Order Activation” in Order System Properties. This option needs to be enabled for In flight change capability. • With this option, assets are created and activated only when order / order line is activated • For bundles / multi-charge types, assets created / updated when last related option or charge type is fulfilled
Billing Changes	<ul style="list-style-type: none"> • Billing can only be initiated after order / order line activation • “Initiate Billing on Order Activation” is not relevant for In flight Order changes and is always treated as if the property is enabled.
Revenue Recognition	<ul style="list-style-type: none"> • No impact on Revenue Recognition as scheduled, after activation
<p>DRAFT or IN AMENDMENT Order</p> <p>Setting Ready for Activation Date or (Ready for Billing Date) on Order Line Item on orders in Draft / In Amendment Order</p>	<p>When the orders are in "Draft" or "In Amendment" status, users can set "Ready for Activation Date" or "Ready for Billing Date" on the order or order line item level. This will not initiate order / order line item activation or billing while order stays in "Draft" or "In Amendment" status.</p> <p>If "Ready for Activation Date" is set on the order or order line item then this will become a trigger to activate order or order line item respectively when the order is accepted.</p>
ACCEPT ORDER / QUOTE	<p>When the order or quote is accepted, system uses the following behavior on the order line items irrespective of delayed asset creation flag.</p>

Action	Behavior
<p>Order line item activation on Accept Order or Quote</p>	<p>READY FOR ACTIVATION DATE ON THE ORDER HEADER</p> <p>Mark all the line items as Fulfilled</p> <p>Initiate 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.</p> <p>INDEPENDENT LINE ITEM:</p> <p>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 system will mark the line item as “Fulfilled” and initiate “order line item activation logic</p> <p>BUNDLES OR MULTI-CHARGE TYPES WHEN Create Asset on Order Activation = TRUE</p> <p>If ready for activation date is set and status of the order line is in “In Amendment” or “Draft”, then system will mark the line item as “Fulfilled”</p> <p>Initiate activation logic, if the current fulfilled item is last item in the bundle or multi-charge items</p> <p>BUNDLES OR MULTI-CHARGE TYPES WHEN Create Asset on Order Activation = FALSE</p> <p>If ready for activation date is set and status of the order line is in “In Amendment” or “Draft”, then system will mark the line item as “Fulfilled”</p> <p>Initiate activation even if there are other items in the bundle or multi-charge types that are still NOT in “Fulfilled” status</p>
<p>PENDING / IN FULFILLMENT / PARTIALLY FULFILLED ORDERS</p> <p>· Activating Order Line Items</p>	<p>READY FOR ACTIVATION DATE ON THE ORDER HEADER</p> <ul style="list-style-type: none"> • Mark all the line items as Fulfilled • Initiate logic for order line item activation <p>INDEPENDENT LINE ITEM:</p>

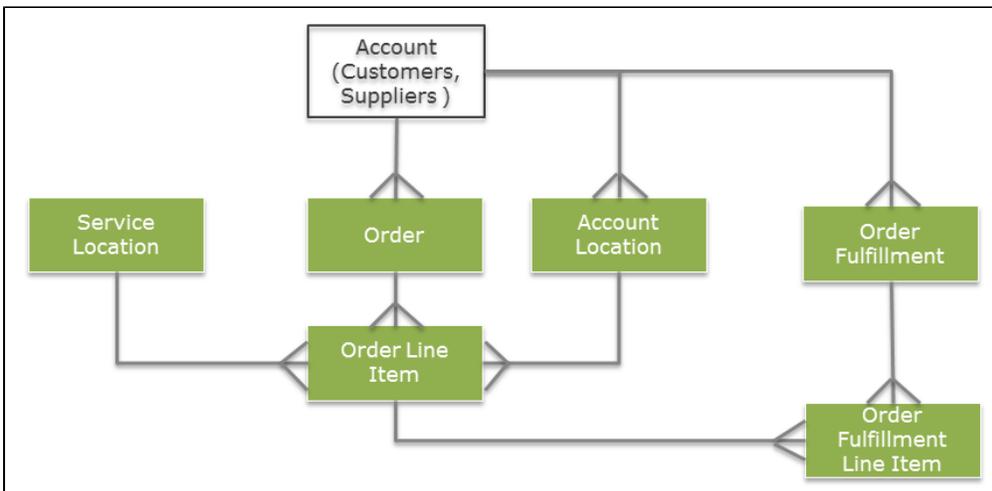
Action	Behavior
	<ul style="list-style-type: none"> • If ready for activation date is set on the order line item and status of the order line is in “Pending” or “In Fulfillment”, then system will mark the line item as “Fulfilled” and initiate “order line item activation logic • If Fulfilled Quantity >= Delta Quantity and status of the order line is in “Pending” or “In Fulfillment” or “Partially Fulfilled”, then mark the line item as “Fulfilled” and initiate “order line item activation logic <p>BUNDLES OR MULTI-CHARGE TYPES WHEN Create Asset on Order Activation = TRUE</p> <ul style="list-style-type: none"> • If ready for activation date is set and status of the order line is in “Pending” or “In Fulfillment”, then mark the line item as “Fulfilled” • If Fulfilled Quantity >= Delta Quantity and status of the order line is in “Pending” or “In Fulfillment” or “Partially Fulfilled”, then mark the line item as “Fulfilled” • Initiate activation logic, if the current fulfilled item is last item in the bundle or multi-charge items <p>BUNDLES OR MULTI-CHARGE TYPES WHEN Create Asset on Order Activation = FALSE</p> <ul style="list-style-type: none"> • If ready for activation date is set and status of the order line is in “Pending” or “In Fulfillment”, then mark the line item as “Fulfilled” • If Fulfilled Quantity >= Delta Quantity and status of the order line is in “Pending” or “In Fulfillment” or “Partially Fulfilled”, then mark the line item as “Fulfilled” • Initiate activation logic, even if there are other items in the bundle or multi-charge types that are still NOT in “Fulfilled” status

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 will be installed at.
Service Location	Specifies the warehouse, plant, factor, fulfillment center, service center of the seller from which the products or services will be delivered from.
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.

Data	Details
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 fulfillments.

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** button 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 fulfilment 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.



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.

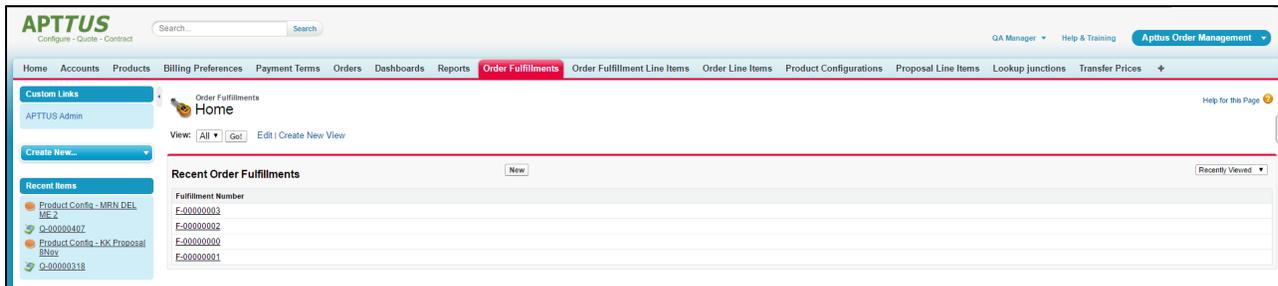
- **Partially Fulfilled:** An Order line item is marked "Partially Fulfilled" if the "Fulfilled Quantity" greater than zero and less than the "Delta Quantity" on the Order Line Item.
- **Fulfilled:** An Order line item is marked "Fulfilled" if the "Fulfilled Quantity" is greater than or equal to "Delta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

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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.

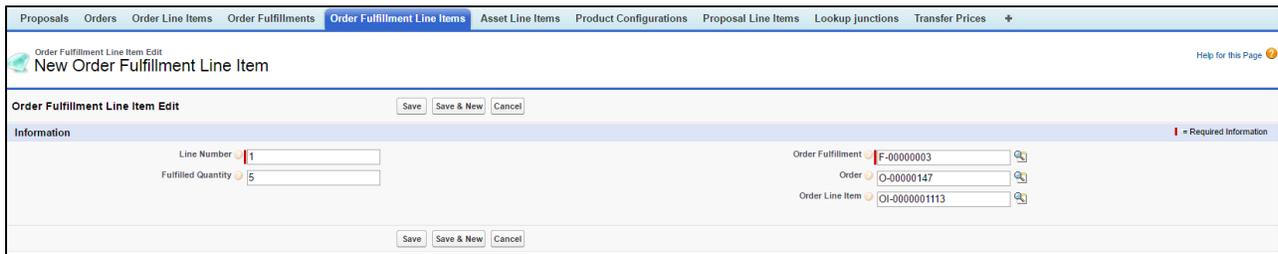


As Apttus Order Management supports Partial Fulfillment, all Order lines from given order do not need to be fulfilled for a given order fulfillment. One order can be fulfilled through multiple order fulfillments.

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.

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



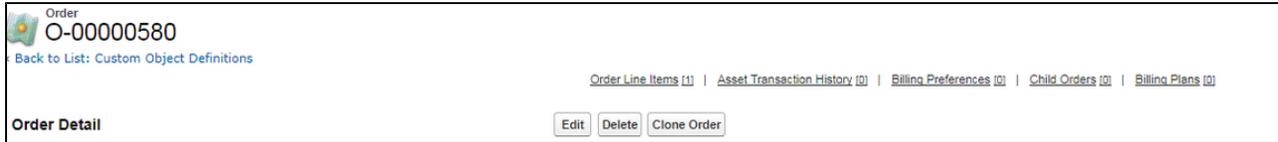
Cloning an Order

You can clone an order and its 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.

- From the Buttons and Links section, drag and drop the Clone Order button on the Order Detail Layout.



Clone Order API allows to do 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 following behavior:

- Deep clone of an 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 will set the status of the order header and order line items to "Draft".
- Cloning an existing order will reset the following fields: Asset Line Item, Ready for Activation Date, and Ready for Billing Date.
- Deep clone will also clone the corresponding cart and cart line items. Cart line items can then be configured and changes similar to a new draft order.

cloneOrder

Parameters		
Name	Type	Description
request	Apttus_Config2.CPQStruct.CloneOrderRequestDO	The request data object.

Request Data Object - Apttus_Config2.CPQStruct.CloneOrderRequestDO		
Field	Type	Description
OrderId	ID	This is the order id that needs to be cloned. This is the order number that remains constant from version to version and is referred by the customer.

Response Data Object - CPQStruct.CloneOrderResponseDO		
Field	Type	Description
OrderItems	List	List of cloned order items
CloneOrderSO	Object	The fields of the Clone Order Object

Code Sample

The sample below enables you to clone an order for a valid order with an Order ID.

```

/***** Clone an order *****/
Id orderid = 'a2n3C000000CfAC';
Apttus_Config2.CPQStruct.CloneOrderRequestDO request = new
Apttus_Config2.CPQStruct.CloneOrderRequestDO();
request.OrderId = orderid;

Apttus_Config2.CPQStruct.CloneOrderResponseDO response
=Apttus_Config2.OrderWebService.cloneOrder (request);
    
```

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 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.

Property/Field	Detail
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.

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. Go 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.

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