



Conga Configure Price Quote (CPQ)

202408.1.0 Preview Release

Get early access to the latest features and improvements.



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Configure Price Quote (CPQ)

Learn to configure products, set up pricing, and generate quotes quickly and accurately using Conga CPQ.


CPQ Release Notes

Discover what's new in the latest release of Conga CPQ.

- [202408.1.0 Release Notes](#)
- [Preview Documentation for Next Release](#)

202408.1.0 Release Notes

In these release notes, you can find new features and enhancements and fixed and known issues for the CPQ 202408.1.0 release. For documentation updates, see [What's New in CPQ Documentation](#).

 This documentation may describe optional features for which you have not purchased a license; therefore your solution or implementation may differ from what is described here. Contact your customer success manager (CSM) or account executive (AE) to discuss your specific features and licensing.

To access the learning path, including overviews and demonstrations of this release's updated features and enhancements, visit the [Conga Learning Center](#).

System Requirements and Supported Platforms

For requirements and recommendations to consider before installing the Conga product suite, see the [System Requirements and Supported Platforms Matrix](#).

New Features and Enhancements

The following features are new to Conga CPQ in this release.

Finalization Checks with EnableFinalizationCheck

You can now control finalization checks using the custom setting "EnableFinalizationCheck" through the config system properties API. The default value is set to false.

```
GET api/revenue-admin/v1/flows/System/settings/ConfigSystemProperties .
```

- When Enabled: Checks for pricing and configuration errors, executes finalization rules, and updates the cart status to "Finalized."
- When Disabled: Skips certain configuration checks and finalization rules but ensures no pricing errors before finalizing the cart.

For more information, see Developer Hub.

Bundle Summary API for Lazy Loading

Administrators can now retrieve the structure of a bundle in the cart by using the Bundle Summary API. By passing the line number of the bundle, the API returns the bundle details, including option groups, child option groups, options, and any sub-bundles.

```
GET /api/cart/v1/carts/{cartId}/bundle/{lineNumber}/details
```

For more information, see Developer Hub.

Enhanced Attribute Lookup Fields in CPQ Config UI

You can view, search, and update attribute lookup fields on the CPQ Config UI. Dropdowns display lookup fields with a default record limit of 200 and adjustable up to 1000.

For more information, see Creating a Lookup Field.

Support for Order Line Item Activation to create Asset Line Item using Activate OLI API

Instead of activating order, you can activate Order Line Item to create Asset Line Item using Activate OLI API. You can create assets on individual activation of Order Line Item for standalone product with single charge type. For Bundle-options and multiple charge types, you must activate Order Line Item of the primary line and then Asset Line Item of entire

bundle-option and multiple charge types is created. For Ramp assets, you must activate Order line item of the primary ramp line. Bundle with sub bundle up to level 5 is supported.

All the custom fields of Order Line Item are copied to Asset Line Item. Attributes and Usage tiers entries are also copied. Asset Line Item history is created. The status of Order, Order Line Item and Asset Line Item is 'Activated'.

Limitation: If you activate Order Line Item of a secondary charge type or option line, then the status is "Fulfilled" and Order status is "Partially Fulfilled". Later when you activate Order Line Item of the primary line then the entire asset line item is created.

```
POST /api/orders/v1/orders/{Id}/activate
```

For more information, see Developer Hub.

Control Bar for Quick Actions in CPQ Web UI

The enhanced CPQ Web UI features a Control Bar on the right side of the page. The following options are available on the control bar and allow you to perform:

- **Cart:** This option allows you to add products.
- **Catalog:** This option displays the high-level categories along with the description and reference image. On clicking the category, you are redirected to the category detail page. The Search a product option allows you to enter the product name, as a result, CPQ web UI lists the categories that the product is associated with.
- **Recommended Products:** This option provides a list of recommended products by validating your quote.
- **Information:** This option provides comprehensive details of the selected quote.
- **Documents:** This option provides a list of documents generated and associated during the quote lifecycle.

Support of Smart Search in Field Picklist for Price Dimension

When creating a new Price Dimension, the 'Field' picklist now supports smart search and auto-suggestions, making it easier to locate and select fields.

For more information, see Creating a Price Dimension.

Support for Asset Renew Operation using Activate Orders API with Constraint Rules

Asset Renew Operation, using Activate Orders API, with constraint rules to add or remove options is supported on Conga Platform for the assets that are created on the Platform.

```
POST /api/orders/v1/orders/{Id}/activate
```

For more information, see Developer Hub.

Support for Filtering Cart Related Fields using AssetLineItemCallback API

Filtering the cart related fields using AssetLineItemCallback API is supported on Conga Platform. This enables you to add logic based on cart related fields. The "cart Id" is passed from the Installed Product page to "Get assets" API.

Viewing Quote Related Details

The quote details page now displays its related information like line items and documents. This enables the sales representatives to get complete details of the quote on a single page.

Support for Asset Change Operation using Activate Orders API with Constraint Rules

Asset change operation, using Activate Orders API, with constraint rules is supported on Conga Platform for the assets that are created on the Platform.

```
POST /api/orders/v1/orders/{Id}/activate
```

For more information, see Developer Hub.

Enhanced Promotions Admin UI

The left panel in the Promotions Admin UI now shows a tick mark only for sections with details, while sections without details keep their original icons.

Enhancement to Update Favorites API

The enhanced Update Favorites API allows you to add more products in public or self-created favorites as needed. To achieve this, the products you are adding to the favorites must be published on the product list you selected. This enhancement keeps the favorite configuration up to date when requirements change.

For more information, see [Update a favorite API](#).

Support for Sync of Renewal Quote using API

When a subscription renewal quote is created on Salesforce it is synced to Conga Platform with the same data and is priced. Auto sync is enabled if the following criteria are satisfied.

- Source Quote ABO Type = Renewal
- Is Auto Accepted = False or Blank

If there is any change in the renewal quote on the platform, then reverse sync to the existing renewal quote on Salesforce is done.

Cart Revalidation Messages

The cart page now shows a validation error if you change a product's configuration, such as updating its expiry date or deactivating it. When you try to relaunch a saved cart in which these products are added before updating them, the cart page displays a validation message and removes such products from the option group if the criteria are unmet.

Support for Editing and Deleting Personalized Views on Installed Products page

On the Installed Products page, you can create a new custom view by selecting the required columns in the Choose Cart Columns tab. The view helps you filter, and display asset line items based on the columns that you have selected. You can now edit and delete the view as required.

For more information, see Asset Features.

Handling Option Group Deletions in Product Configurations

You can delete an option group (Root or Child) based on the presence of associated products and the `deleteHierarchy` parameter. For product option groups, the deletion removes the group and its children without affecting other related groups.

For more information, see Delete an Option Group API and Deleting an Option Group.

Support for Custom Fields during Suspend and Resume Operations

After the assets are purchased and there is a requirement to Suspend and Resume at a certain time, you can provide a reason or additional details on different fields during the transaction. The pop-up displays the start and end date, the selling term, and four custom fields to add reason or other details. These custom fields are coming from Asset Settings or API which are selected by the Admin. All the field values are displayed on the Suspended and Resumed lines on cart, also the entire record is read-only.

Support for Suspending Assets using CartCheckout API

CartCheckout API now supports creating order and order line items for suspended assets. The order line item shows the start and end date and the pricing is fetched from the asset.

On order activation the asset and order line items are in a Suspended state and the suspended start and end date is updated.

```
POST /api/cart/v1/carts/{cartId}/order
```

For more information, see Developer Hub.

Enhanced Sorting Feature on Catalog Page

You can specify additional product fields based on which products are sorted in ascending or descending order. To achieve this, you must update the `ProductsSortingFields` with product fields in the request body while invoking `Update custom settings associated with a flow` API. If you pass the empty values in `ProductsSortingFields`, the system fetches the product name label by default.

This enhancement provides more flexibility to view the products on the catalog page based on business requirements. Once you add the product fields to `ProductsSortingFields`, the catalog page displays those fields in the sorting dropdown and the system also translates the labels of those fields and converts them to the language based on locale setting.

For more information, see `Update custom settings associated with a flow`.

View Applied Actions for Products via API

Administrators can now use the "Get the applied rules action" API to view actions applied to a product and its children during configuration, including related fields and rules that triggered these actions. This helps to retrieve the information why rules were applied.

```
GET /api/cart/v1/carts/{cartId}/applied-rule-actions
```

For more information, see Developer Hub.

View Constraint Rules Fired for a Product via API

Administrators can now use the "Get the applied rules action" API to view a list of constraint rules applied to a product and its children, along with related fields. This helps to retrieve the information why specific rules were triggered.

```
GET /api/cart/v1/carts/{cartId}/applied-rule-actions
```

For more information, see Developer Hub.

Fixed Issues

The following issues are fixed in this release. If any actions are required, they will be listed in this table.

Case Number	Conga Internal ID	Description
NA	CPQ-85597	Bundle asset options do not expand on the Installed Products page but are visible in the cart during operations.
NA	CPQ-85364	The Attribute Value Matrix is not working after the data sync from Salesforce to Conga Platform.
NA	CPQ-85363	While viewing the Attribute Value Matrices, the entries are displayed in an incorrect sequence.
HE-8	CPQ-84934	Product Attribute Rule does not work with Value Expression as line item fieldName. After data sync, Salesforce field names appear in the Value Expression field instead of the correct platform-specific fields.
00897400	CPQ-84654	Submit for Approval button remains disabled for specific bundle products in carts, even when Auto Approval criteria are met.

Known Issues

The following unresolved issues are known to Conga at the time of this release.

Conga Internal ID	Description
CPQ-85847	Constraint rules using the "Not In" filter condition trigger incorrectly, activating even when the condition is not met. Rules without the "Not In" filter work as expected.

Conga Internal ID	Description
CPQ-85725	-
CPQ-85658	Attribute Value Matrices do not work when "IsWildcard" is set to false. This issue was observed after performing a data sync from Salesforce to the Platform.
CPQ-85590	When you try to open product details page from the catalog, you encounter rendering issue. This issue is observed for the products with picklist values.
CPQ-84857	Constraint rules, such as Max Quantity Validation, are not triggering as expected, despite meeting all conditions.
CPQ-83960	An error message appears from constraint rule, even when the required option is already added by default in the bundle. <div style="border: 1px solid #ccc; padding: 2px; background-color: #f9f9f9;"> <p>Error: Please be sure to select only one Installation charge.</p> </div>

DOC ID: CPQRLP202408.1.0RN20240819

Preview Documentation for Next Release

We provide a preview code drop two weeks before the production deployment, giving you early access to the latest features and improvements. You can view the Preview Release Documentation in PDF.

About CPQ

Conga CPQ is a sales tool for companies to generate quotes for orders quickly and accurately. Quote creation involves configuring products and services, pricing them, and generating quotes based on predefined rules. Conga CPQ produces accurate quotes making complex products, pricing, and business rules centralized, automatic, and available in real-time.

Conga CPQ is a CRM-agnostic solution available on Conga Platform. With an API-first approach, CPQ services (configuration, pricing, quoting) can be embedded into customer's eCommerce, Direct Sales, and Partner Portals. Conga CPQ helps customers to streamline configuration and pricing across revenue lifecycle operations, providing faster scale and performance.

Conga CPQ provides the ability to offer self-service capabilities for guided configuration and contracted pricing embedded on any B2B eCommerce site. Conga CPQ provides customers the ability to choose which capability (configuration, pricing, quoting) they want to embed into their revenue lifecycle, at a pace that supports their business needs.


What's New in CPQ Documentation

This section lists changes in the documentation to support each release.

202408.1.0

Document	Publication Date	Topic	Description
202408.1.0		Deleting an Option Group	Added task topic for deleting option group and product option group.
		Creating a Price Dimension	Added search support step for Field item.
		Defining Benefits of a Promotion	Added a note related Rate Table under the Rate Type step.
		Asset Features	Updated the parity table to indicate the availability of editing and deleting personalized views on the Installed Products page.

202407.2.0

Document	Publication Date	Topic	Description
202407.2.0	 05 Aug 2024	Managing Catalog	New Topic.


Document	Publication Date	Topic	Description
		Managing the Products	Updated topic to re-structure the task topics.
		Managing the Product Groups	Updated topic to re-structure the task topics.
		Managing Price Lists	Updated topic to re-structure the task topics.
		Creating a Field Expression	Added a note for objects like Line Item, Product, and Attribute in the expression builder.
		Configuring Price Matrix Entries	Added Field Expression steps for adding price matrix entries.
		Adding Details to a Price List Item	Added Filter Expression steps for related pricing.
		Configuring Column Settings	Added Price Waterfall column settings.
		Associating Attribute Groups with a Product	Create new attribute directly on the associated attributes page under products.
		Associating Feature Sets with a Product	Create new feature set directly on the associated feature set page under products.
		Associating Product Groups with a Product	Create new product group directly on the associated product group page under products.
		Associating Categories with a Product	Create new category directly on the associated categories page under products.

Document	Publication Date	Topic	Description
		Associate an Attribute to an Attribute Group	Create new attribute directly on the associated attributes page under attribute group.
		Associating Dimension to the Dimension Set	New Feature
		Managing Catalog	Added actions available.
		Managing the Product Groups	Added export feature under available actions.
		Managing the Feature Sets	Added export feature under available actions.
		Managing Field Expressions	Added export feature under available actions.
		Managing the Constraint Rules	Added export feature under available actions.
		Managing Price Lists	Added export feature under available actions.
		Deleting a Price List	Added multiple deletion.
		Deleting a Price Dimension	Added multiple deletion.
		Managing Price Dimensions	Added export feature under available actions.
		Managing the Price Waterfall	Added export feature under available actions.
		Deleting the Price Waterfall	Added multiple deletion.

Document	Publication Date	Topic	Description
		Managing the Promotions	Added export feature under available actions.
		Deleting a Promotion	Added multiple deletion.
		Deleting a Price Waterfall Ruleset	Added multiple deletion.
		Managing Price Waterfall Rulesets	Added export feature under available actions.
		Managing Deal Guidance	Added export feature under available actions.
		Deleting Color Bands	Added multiple deletion.
		Deleting Dimension	Added multiple deletion.
		Deleting Dimensions Sets	Added multiple deletion.
		Deleting Guidance Rule	Added multiple deletion.
		Configuring Storefront Settings	Added export feature under available actions.
		Configuring Flow Settings to Override Global Settings	Added export feature under available actions.
		Deleting Storefront Settings	Added multiple deletion.
		Managing Price Rulesets	Added export feature under available actions.
		Deleting a Price Ruleset	Added multiple deletion.
		Deleting a Price Rule Entry	Added multiple deletion.

Document	Publication Date	Topic	Description
		Creating Price Rule Entries	Added formula builder for adjustment amount source.
		Creating Price Waterfall Ruleset Entry	Added formula builder for adjustment amount source.
		Asset Features	Updated the parity table to indicate the availability of creating personalized views on Installed Products page.

202407.1.1

Document	Publication Date	Topic	Description
202407.1.1	 26 Jul 2024	Creating an Attribute	Added List Views for Picklist and Multi Picklist.
		Managing the Attributes and Attribute Groups	Added Attribute Views and Attribute Group Views.
		Managing Product Attribute Rules	Added Product Attribute Rule Views.
		Managing the Option Groups	Added Product Option Groups Views.
		Asset Settings	Added Asset Restore Settings under General settings.
		Asset Settings	Added Renewal fields for Asset in Global settings.
		Managing the Views	New topic.

202406.2.0

Docu ment	Publica tion Date	Topic	Description
20240 6.2.0	📅 08 Jul 2024	Creating a Constraint Rule	Multi-Select Picklist for "Match In" in Constraint Rule Creation.
		Associating Categories with a Price List	Associated Category Sequence in Pricelist.
		Configuring a Constraint Rule Using the Advanced Rule Setup	Removed RelatedLines value from Match In field.
		Creating a Price Dimension	Added Custom Context Type for Price Dimension.
		Cloning a Price Dimension	Added Custom Context Type for Price Dimension.
		Associating Price Lists with a Product	Added "Price List Item column" in the Product Association page.
		Creating Price Waterfall Charts	Added User Role Criteria for Waterfall Chart.

202406.1.0

Docu ment	Publica tion Date	Topic	Description
20240 6.1.0		Configuring a Constraint Rule Using the Advanced Rule Setup	Added Match In Assets for Inclusion and Exclusion Action Types.
		Associating Products with an Option Group	Added mass export action feature.

Docu ment	Publica tion Date	Topic	Description
		Exporting Promotions	New feature.
		Deleting a Promotion	Added mass delete action feature.
		Config Settings	Added Horizontal Attribute Group View configuration.
		Configuring the Price Lists	Added clone feature.
		Managing Price Lists	Mentioned about clone action.
		Creating Price Waterfall Charts	Removed Is Editable field.
		Managing the Products	Added info icon information which provides details of the associated entity..
		Associating Feature Sets with a Product	Removed info icon information which provided details of the associated feature set.
		Associating Option Groups with a Product	Removed info icon information which provided details of the associated option group.
		Associating Attribute Groups with a Product	Removed info icon information which provided details of the associated attribute group.
		Configuring the Products	Edited the Add New Product pop-up to New Product.
		Associating Option Groups with a Product	Added remove associated option group with product feature.

Docu ment	Publica tion Date	Topic	Description
		Associating Feature Sets with a Product	Added the resequencing feature for Associated feature sets.

202405.2.0

Docu ment	Publica tion Date	Topic	Description
202405 .2.0		Managing Deal Guidance	Added Navigating Deal Guidance Rule.
		Creating Guidance Rules	New feature.
		Deleting a Dimension	Added creating dimension section.
		Configuring the Products	Updated with uploading picture for a product.
		Creating Price Waterfall Charts	Updated with clone function.

202405.1.0

Docu ment	Publica tion Date	Topic	Description
202405 .1.0		Defining Coupons	Added price dimension field to defining coupons for a promotion.
		Associated Products under Attribute Groups	New Feature
		Asset Settings	Added the values for Asset application settings.

Docu ment	Publica tion Date	Topic	Description
		Creating the Option Groups	"Where used" option for Option Groups
		Configuring Product Groups	"Where used" option for Product groups

202404.2.0

Docu ment	Publica tion Date	Topic	Description
20240 4.2.0		Adding Details to a Price List Item	Updated Price List Item with Related Price List Item.
		Creating an Attribute Value Matrix	Added Scope and Matrix details for Attribute Value Matrix.
		Managing Views	Added the Asset Views for Asset Page.
		Configuring Action Settings	Added the Price Waterfall Page configuration.
		Creating a Color Band	Updated the fields as mandatory.

202404.1.0

Docu ment	Publica tion Date	Topic	Description
20240 4.1.0		Asset Pricing Criteria	New Feature

Docu ment	Publica tion Date	Topic	Description
		Adding Details to a Price List Item	Updated the List price field.
		Configuring the Price Lists	Removed the Cost Model field.
		Creating the Price Waterfall	Updated Manage Price Points topic to enable the checkbox element against the row when the row is disabled.
		Cart Settings	Updated topic to remove Disable Cart Activity History and Disable Cart Async Notification settings as they are not supported in the Conga Platform flow.
		Pricing Settings	Updated topic to remove Enable Keyed Matrix Pricing setting as it is not supported in the Conga Platform flow.

202403.3.0

Docume nt	Publicati on Date	Topic	Description
202403.3 .0	📅 17 Apr 2024	Managing Price List Items	Added a note about how the products with multiple charge types are sequenced and displayed on the catalog page.
		Managing the Promotions	Re-structured topic for a better documentation flow.
		Defining Limits of a Promotion	Updated topic with new UI and procedure.
		Defining Coupons of a Promotion	New Topic.

202403.2.0

Document	Publication Date	Topic	Description
202403.2.0	📅 03 Apr 2024	Creating Price Waterfall Ruleset Entry	New Feature
		Managing the Price Waterfall	Updated topic to add view option.
		Cart Features	Updated parity table to indicate the availability of the following features. <ul style="list-style-type: none"> • Cart Size <ul style="list-style-type: none"> • Upto 5000 Line Items • Upto 10000 Line Items

202403.1.0

Document	Publication Date	Topic	Description
202403.1.0	📅 20 Mar 2024	Creating Price Waterfall Rulesets	New Feature
		Defining Benefits of a Promotion	New Feature
		Cart Features	Updated parity table to indicate the availability of the following features. <ul style="list-style-type: none"> • Locale Support <ul style="list-style-type: none"> • CPQ Data Translation (API)
		Creating the Option Groups	Updated topic to add a new section creating sub-option groups.
		Config Features	Updated parity table to indicate the availability of the following features. <ul style="list-style-type: none"> • Replacement Constraint Rule <ul style="list-style-type: none"> • Product Field Set • Product Option Group

202402.2.1

Document	Publication Date	Topic	Description
202402.2.1	📅 06 Mar 2024	Managing Price Waterfall Rulesets	Added the deletion feature.
		Creating the Price Waterfall	Added a note.
		Configuring Column Settings	Added a note
		Creating Price Waterfall Ruleset	Creating and adding conditions to the price waterfall ruleset.
		Creating the Price Waterfall	Delete waterfall charts.
		Managing the Option Groups	Clone Option Groups.

202402.1.0

Document	Publication Date	Topic	Description
202402.1.0	📅 23 Feb 2024	Managing the Promotions	Added the summary screen for promotions.
		Creating the Price Waterfall Charts	Added the price point management for waterfall creation.
		Associating Option Groups	Added a note for sequencing option groups.
		Managing Price Waterfall Rulesets	New Topic.
		Cart Features	Updated Revalidation feature parameters.

Document	Publication Date	Topic	Description
		Pricing Features	<ul style="list-style-type: none"> Updated Price Waterfall feature parameters. Added Reprice Quotes, Deal Maximizer, and Data Sync Features.

February' 24

Document	Publication Date	Topic	Description
February' 24	📅 06 Feb 2024	Associating an Attribute to the Attribute Group	Added a note about the reordering attribute.
		Configuring a Constraint Rule Using the Advanced Rule Setup	Added a note for condition criteria in Action Criteria field.
		Cart Features	Updated parity table to indicate the availability of the following feature. <ul style="list-style-type: none"> Validation Callback Class
		Customizing CPQ on Conga Platform using Callback Classes	New Topic.
		Validation Callback Class on Conga Platform	New Topic.
		Recommendation Callback Class on Conga Platform	New Topic.
		Option Filter Callback Class on Conga Platform	New Topic.

January' 24

Document	Publication Date	Topic	Description
January' 24	📅 04 Jan 2024	Managing Price Waterfall	New Feature
		Overriding Global Settings at a Flow Level	Added Use Enhanced CSS for Override Settings at Flow Level.
		Configuring Column Settings	Added Cart Line Item as Display Type for Cart Page.
		Configuring Action Settings	Added the Asset page in the Action Settings.
		Configuring Column Settings	Added Asset Page column settings.
		Pricing Settings	Removed Multi Currency Management from the Advance Pricing section.
		Managing the Promotions	New Feature.

December '23

Document	Publication Date	Topic	Description
December '23	📅 29 Nov 2023	Configuring Price Matrices	Added a pop-up which shows dimension info when hovered upon dimension name.
		Configuring Column Settings	Removed <i>Display Type</i> column.
		Configuring Action Settings	Removed <i>Display Type</i> column.
		Pricing Settings	Removed <i>Defer Pricing</i> and <i>External Pricing</i> from <i>Global Pricing</i> .
		Pricing Settings	Removed <i>Custom Deal Guidance Page</i> from <i>Advanced Pricing</i> .

Document	Publication Date	Topic	Description
		Config Settings	Removed Constraint Rules section.
		General Settings	Removed <i>Run Finalization Task in Async Mode</i> field from <i>Finalization and Approvals</i> table.
		Creating a Promotion	New Feature
	📅 21 Nov 2023	Adding Miscellaneous Settings to A Price List Item	Added a note for sorting according to Period Number.
		Creating Price Rulesets	Added a note for info icon for Enable Date Range field.
		Overriding Global Settings at a Flow Level	Added new fields for the override settings table.
		Cloning A Price Dimension	New Feature
		Configuring the Installed Product Page	New Feature

November '23

Document	Publication Date	Topic	Description
November '23	📅 02 Nov 2023	Config User Preferences	Added a new field Pin Option Group by Default

Document	Publication Date	Topic	Description
	📅 01 Nov 2023	Config Settings	Updated topic to add new setting <i>Collapse All Leaf Option Groups</i> .
		Creating the Option Groups	Updated topic to add a new setting <i>Expanded by Default</i> and Attaching an Image features.
		Configuring the Products	Updated topic to add details about creating a new product using the clone feature.
		Cart Settings	Updated topic to add details about Column Render Threshold option.
		Managing the Constraint Rules	New topic.
		Managing Product Attribute Rules	Updated topic to add details about UI enhancements.

October '23

Document	Publication Date	Topic	Description
October '23	📅 26 Oct 2023	Configuring Price Matrices	Searching/Sorting a Matrix in the PLI.
		Creating a Price Rule	Searching/Sorting/Filter feature added to Price Rules.
		Associating Price Lists with a Product	Added an info for charge type button.
		Promotions	New Feature
	📅 04 Oct 2023	Cart Features	Updated parity table to indicate the availability of the following features. <ul style="list-style-type: none"> • Callbacks <ul style="list-style-type: none"> • Validation Callback (Cart UI and API)

Docu ment	Public ation Date	Topic	Description
		Associating Feature Sets with a Product	New Topic

September '23


Docu ment	Publica tion Date	Topic	Description
Septe mber '23		Creating a Color Band	New Feature
Septe mber '23		Creating a Price List Item	Added a note to mention a requirement under To Create a Price List Item.
Septe mber '23		Pricing Features	Updated parity table to indicate the availability of the following features. <ul style="list-style-type: none"> • Multi-Currency <ul style="list-style-type: none"> • Use of Multi-Currencies (Cart UI) • Custom and Formula Fields <ul style="list-style-type: none"> • Formula Fields (Admin UI)

August '23

Docu ment	Publica tion Date	Topic	Description
Augu st '23		Managing the Rollup	New Feature

Docu ment	Publica tion Date	Topic	Description
		Cart Features	<p>Updated parity table to indicate the availability of the following features.</p> <ul style="list-style-type: none"> • Locale <ul style="list-style-type: none"> • Metadata Translation (UI) • Cart Revalidation <ul style="list-style-type: none"> • Pricing Changes • Product Changes
		Catalog Features	<p>Updated parity table to indicate the availability of the following features.</p> <ul style="list-style-type: none"> • Visibility Rules (UI)
		Pricing Features	<p>Updated parity table to indicate the availability of the following features.</p> <ul style="list-style-type: none"> • Buy X Get X (API) • Buy X Get Y (API) • For Every X, Get X (API) • For Every X, Get Y (API) • Line Item Promotions (API) • Summary Group Promotions (API) • Scope (API) • Criteria (API) • Benefits (API) (API) • Limits (API) • Coupons (API) • Sales Promotions (API) • Update Promotions/Coupons (API) • Delete Promotions/Coupons (API) • Apply Promotions (API) • Apply Coupons (API) • Remove Promotions (API) • Remove Coupons (API)
		Managing the Feature Sets	New Feature


July '23

Document	Publication Date	Topic	Description
July '23	 05 Jul 2023	Cart Features	<p>Updated parity table to indicate the availability of the following features.</p> <ul style="list-style-type: none"> • Finalize Cart <ul style="list-style-type: none"> • Sync Finalize (UI) • Revalidate Cart <ul style="list-style-type: none"> • Revalidate Cart for Product Changes (API) • Revalidate Cart for Pricing Changes (API)
		Catalog Features	<p>Updated parity table to indicate the availability of the following features.</p> <ul style="list-style-type: none"> • Actions <ul style="list-style-type: none"> • Compare Products (UI)
		Config Features	<p>Updated parity table to indicate the availability of the following features.</p> <ul style="list-style-type: none"> • Inclusion Constraint Rule <ul style="list-style-type: none"> • Option Group Scope • Exclusion Constraint Rule <ul style="list-style-type: none"> • Option Group Scope • Option Configuration <ul style="list-style-type: none"> • Is Hidden (UI) • Is Picklist (UI) • Attribute Value Matrices <ul style="list-style-type: none"> • Product Scope (UI)

Document	Publication Date	Topic	Description
		Pricing Features	Updated parity table to indicate the availability of the following features. <ul style="list-style-type: none"> Usage Price Tiers <ul style="list-style-type: none"> Adding New Price Tier (UI) Modify Existing Price Tier (UI) View-Only Others <ul style="list-style-type: none"> Locale
		Lookup Fields	New topic.
		Creating a Lookup Field	New topic.
		Configuring Action Settings	Updated the topic with the availability of the Add New button.
		Configuring Column Settings	Updated the topic with the availability of the Add New button.
		Associating Attribute Rules with a Product	New topic.
		Creating a Constraint Rule	Added information about creating a specific type of rule directly from the drop-down arrow next to the Create New button.
		Configuring a Constraint Rule Using the Advanced Rule Setup	Added information about removing criteria.
		Managing Field Expressions	New topic.
		Creating a Field Expression	New topic.

Document	Publication Date	Topic	Description
		Adding Charge Type Criteria to a Product	Added information about selecting custom fields.
		Configuring Price Matrices	Added information about the Dimensions section.
		Configuring Price Matrix Entries	Added information about selecting custom fields.
		Creating a Price Dimension	Added information about selecting custom and formula fields.
		Creating a Price Ruleset	Added information about updating a price ruleset with Condition & Charge Type Criteria.
		Creating Price Rule Entries	Added information about selecting custom fields.
		Managing Deal Guidance	New topic.
		Creating a Dimension Set	New topic.
		Creating a Dimension	New topic.

June '23

Document	Publication Date	Topic	Description
June '23	 06 Oct 2023	Assigning the Configuration to the Collaborator or Queue	Added a note for the attachment field in the Quote Collaboration table.

Document	Publication Date	Topic	Description
	 07 Jun 2023	Catalog Settings	Removed the settings that are not supported.
		Config Settings	Removed the settings that are not supported.
		Cart Settings	Removed the settings that are not supported.
		Pricing Settings	Removed the settings that are not supported.
		Favorite Settings	Removed the settings that are not supported.
		General Settings	Removed the settings that are not supported.
		Object Summary View Settings	Removed the settings that are not supported.
		Configuring Action Settings	New topic.
		Configuring Column Settings	New topic.
		Managing Views	New topic.
		Associating Price Lists with a Product	Added information about adding charge type, charge type criteria, and matrices to PLI.
		Managing the Attributes and Attribute Groups	New topic.
		2024-07-25_06-11-25_Creating an Attribute vJune-23	New topic.

Document	Publication Date	Topic	Description
		2024-07-25_06-12-10_Creating an Attribute Group vMay-23	New topic.
		Associating an Attribute to an Attribute Group	New topic.
		Managing Product Attribute Rules and Attribute Value Matrices	New topic.
		Creating a Product Attribute Rule	New topic.
		2024-07-25_07-16-19_Managing Attribute Value Matrices vJune-23	New topic.
		Creating an Attribute Value Matrix	New topic.
		Managing Price List Items	New topic.
		Adding Charge Types to a Product	New topic.
		Adding Charge Type Criteria to a Product	New topic.
		Creating a Price List Item	New topic.
		Adding Default Pricing to a Product	New topic.
		Adding Details to a Price List Item	New topic.

Document	Publication Date	Topic	Description
		Adding Miscellaneous Settings to a Price List Item	New topic.
		Configuring Price Matrices	New topic.
		Configuring Price Matrix Entries	New topic.
		Managing Price Dimensions	New topic.
		Creating a Price Dimension	New topic.
		Managing Price Rulesets	New topic.
		Creating a Price Rule	New topic.
		Creating a Price Ruleset	New topic.
		Creating Price Rule Entries	New topic.

Document	Publication Date	Topic	Description
		<p>Cart Features</p>	<p>Updated parity table for View cart read-only, Update Existing View, Delete Cart View, useAdvancedApproval, Mass update, and View summary group totalling.</p> <p>Updated parity table to indicate the availability of the following features.</p> <ul style="list-style-type: none"> • Summary Group <ul style="list-style-type: none"> • Category • Product • Ad-hoc • Mass update • View cart read-only, • Update Existing View, • Delete Cart View, • useAdvancedApproval, • Mass update, and • View summary group totalling • Approvals <ul style="list-style-type: none"> • Cart level approvals • Line level approvals
		<p>Catalog Features</p>	<p>Updated parity table to indicate the availability of the following features.</p> <ul style="list-style-type: none"> • Add Favorites • Location • Deep Clone

Document	Publication Date	Topic	Description
		Config Features	<p>Updated parity table to indicate the availability of the following features.</p> <ul style="list-style-type: none"> • Recommendation Constraint Rules <ul style="list-style-type: none"> • Product Scope • Product Group Scope • Product Family Scope • Exclusion Constraint rule <ul style="list-style-type: none"> • Is Bundle Context • Inclusion Constraint Rule <ul style="list-style-type: none"> • Bundle Context • Validation Constraint Rule <ul style="list-style-type: none"> • Criteria • Field Set • Product Attribute Rules for Product group and product family: <ul style="list-style-type: none"> • Hidden • Required • Reset

April '23

Docu ment	Publicati on Date	Topic	Description
April '23	📅 05 Apr 2023	Cart APIs	<p>Added documentation for the following APIs:</p> <ul style="list-style-type: none"> • GET /api/cart/v1/carts/{cartId}/status • POST/api/cart/v1/favorites • GET/api/cart/v1/favorites/{Id} • POST/api/cart/v1/favorites/{Id}/publish • DELETE/api/cart/v1/favorites/{Id} • POST/api/cart/v1/favorites <p>Updated documentation for the following APIs:</p> <ul style="list-style-type: none"> • POST/carts/{cartId}/items • PATCH/carts/{cartId}/items • POST/quotes/{quoteId}/carts/activate • POST/carts/{cartId}/quote
		Catalog APIs	<p>Added documentation for the following API:</p> <ul style="list-style-type: none"> • GET/favorites
		Cart Features	<p>Updated Supported features table with the following newly supported features.</p> <ul style="list-style-type: none"> • Filter Cart Lines <ul style="list-style-type: none"> • Cart Basic Search • Cart Advanced Search • Cart Actions <ul style="list-style-type: none"> • Copy Cart Lines • Cart View <ul style="list-style-type: none"> • Create New View • Update Existing View • Delete Cart View

Document	Publication Date	Topic	Description
		Config Features	Updated Supported features table with the following newly supported feature <ul style="list-style-type: none"> • Validation Constraint Rules <ul style="list-style-type: none"> • Product Scope
		Catalog Features	Updated Supported features table with the following newly supported features. <ul style="list-style-type: none"> • Favorites <ul style="list-style-type: none"> • Display Favorites • Search Favorites • Publish Favorites
		Deal Maximizer Setup APIs	Added documentation for the following APIs: <ul style="list-style-type: none"> • <code>DELETE/dimension-sets/{dimensionSetId}/dimensions</code> • <code>GET/dimension-sets/{dimensionSetId}/dimensions</code> • <code>GET/rules/{ruleId}/entries</code> • <code>DELETE/rules/{ruleId}/entries</code> • <code>DELETE/rules</code> • <code>PATCH/rules/{ruleId}/entries</code> • <code>GET/rules</code> • <code>DELETE/rules</code> • <code>PATCH/rules</code> Updated documentation for the following APIs: <ul style="list-style-type: none"> • <code>POST/rules</code>
		Creating Constraint Rules for a Product	Added the "Navigating the Constraint Rules Page" section.
		Associating Categories with a Product	New topic.
		Managing the Product Groups	Added information about editing the layout.

Document	Publication Date	Topic	Description
		Creating Constraint Rules for a Product Group	Added the "Navigating the Constraint Rules Tab" section.
		Managing the Constraint Rules	Added information about editing the layout.
		Managing the Categories	New topic.
		Managing the Option Groups	New topic.
		Associating Products with an Option Group	New topic.
		Creating an Option Group	New topic.
		Managing Price Lists	Updated the "Navigating the Price Lists Page" section.
		Associating Categories with a Price List	New topic.
		Creating a Price List Item	New topic.

March '23

Document	Publication Date	Topic	Description
March '23	📅 01 Mar 2023	Revenue Admin User Interface	New topic
		Configuring Application Settings	New topic
		Configuring Global Settings	New topic
		Catalog Settings	New topic
		Config Settings	New topic

Document	Publication Date	Topic	Description
		Cart Settings	New topic
		Pricing Settings	New topic
		Favorite Settings	New topic
		General Settings	New topic
		Object Summary View Settings	New topic
		Configuring Flow Settings to Override Global Settings	New topic
		Configuring the Flows	New topic
		Overriding Global Settings at a Flow Level	New topic
		Product Administration	New topic
		Managing the Products	New topic
		Configuring the Products	New topic
		Associating Price Lists with a Product	New topic
		Creating Constraint Rules for a Product	New topic
		Associating Categories with a Product	New topic
		Associating Product Groups with a Product	New topic
		Associating Attribute Groups with a Product	New topic

Document	Publication Date	Topic	Description
		Associating Option Groups with a Product	New topic
		Managing the Product Groups	New topic
		Configuring Product Groups	New topic
		Associating Products with a Product Group	New topic
		Creating Constraint Rules for a Product Group	New topic
		Pricing Administration	New topic
		Managing Price Lists	New topic
		Configuring the Price Lists	New topic
		Cart APIs	<p>Added documentation for the following APIs:</p> <ul style="list-style-type: none"> • <code>POST/quotes/{quoteId}/carts/activate</code> • <code>POST/carts/{cartId}/items/clone</code> <p>Updated documentation for the following APIs:</p> <ul style="list-style-type: none"> • <code>POST/carts/{cartId}/finalize</code>

Document	Publication Date	Topic	Description
		Catalog APIs	Updated documentation for the following APIs: <ul style="list-style-type: none">• POST/search• GET/categories/{categoryId}• GET/categories

Document	Publication Date	Topic	Description
		Catalog Setup APIs	<p>Added documentation for the following APIs:</p> <ul style="list-style-type: none"> • POST/products/{parentID}product-group-members • DELETE/products/{parentID}product-group-members • GET/products/{id}/product-groups • GET/categories/{categoryId}/products • GET/categories/{categoryId}/price-lists • POST/products/{productId}/product-categories • DELETE/products/{productId}/product-categories


Document	Publication Date	Topic	Description
		Deal Setup APIs	<p>Added documentation for the following APIs:</p> <ul style="list-style-type: none"> • POST/ colorbands • PATCH/ colorbands • POST/rules/ {ruleId}/ entries • POST/rules • POST/rules • GET/dimension- sets • GET/dimensions • DELETE/ dimensions • PATCH/ dimensions • DELETE/ dimension-sets • PATCH/ dimension-sets • POST/ dimension-sets • POST/ dimension- sets/ {dimensionSetI d}/dimensions

February '23

Document	Publication Date	Topic	Description
February '23	📅 08 Feb 2023	Cart APIs	<p>Added documentation for the following APIs:</p> <ul style="list-style-type: none"> • <code>POST/carts/{cartId}/finalize</code> <p>Updated documentation for the following APIs:</p> <ul style="list-style-type: none"> • <code>POST/carts/{cartId}/items</code> • <code>PATCH/carts/{cartId}/items</code> • <code>DELETE/carts</code> • <code>DELETE/carts/{cartId}</code> • <code>POST/carts/{cartId}/order</code> • <code>POST/carts</code>
		Catalog APIs	<p>Added documentation for the following APIs:</p> <ul style="list-style-type: none"> • <code>POST/Search/typeahead</code> <p>Updated documentation for the following API:</p> <ul style="list-style-type: none"> • <code>POST/search</code> • <code>GET/categories/{categoryId}/products</code> • <code>GET/products</code>
		Pricing Setup APIs	<p>Updated documentation for the following API:</p> <ul style="list-style-type: none"> • <code>POST/price-lists</code> • <code>POST/matrices</code> • <code>POST/price-lists/{priceListId}/price-list-items</code>
		Deal Setup APIs	New topic
		Integrating CPQ with the Conga Platform	New topic
		Use Case: User Authentication to Conga Platform	New topic

Document	Publication Date	Topic	Description
		Use Case: Getting the Application Context	New topic
		Use Case: Browsing the Catalog	New topic
		Supported Features in CPQ	New topic
		Cart Features	New topic
		Catalog Features	New topic
		Config Features	New topic
		Pricing Features	New topic

January '23

Document	Publication Date	Topic	Description
January '23	 04 Jan 2023	Cart APIs	<p>Added documentation for the following APIs:</p> <ul style="list-style-type: none"> POST/carts/{cartId}/quote GET/quotes/{quoteId}/carts/active POST/carts/{cartId}/clone <p>Updated documentation for the following APIs:</p> <ul style="list-style-type: none"> GET/carts/{cartId}/items POST/carts/{cartId}/items POST/carts/{cartId}/order


Document	Publication Date	Topic	Description
		Catalog APIs	Updated documentation for the following API: <ul style="list-style-type: none"> POST/search
		Catalog Setup APIs	Added documentation for the following APIs: <ul style="list-style-type: none"> GET/visibility-rule/{visibilityRuleId} GET/visibility-rule DELETE/visibility-rule/{visibilityRuleId}
		Pricing Setup APIs	Updated documentation for the following APIs: <ul style="list-style-type: none"> POST/price-lists/{priceListId}/prices
		Settings APIs	Added documentation for the following APIs: <ul style="list-style-type: none"> PUT/flows/{flowName}/settings/{settingName}/{childSettingName} GET/flows/{flowName}/settings/{settingName}/{childSettingName} PUT/flows/{flowName}/actions Updated documentation for the following APIs: <ul style="list-style-type: none"> POST/flows
		Use Case: Building Quotes	New topic
		Use cases: Working with Order APIs	New topic
		Use Case: Updating an Order	New topic

December '22

Document	Publication Date	Topic	Description
December '22	📅 07 Dec 2022	Cart APIs	<p>Added documentation for the following APIs:</p> <ul style="list-style-type: none"> POST/carts/{cartId}/order POST/carts/{cartId}/price <p>Updated documentation for the following APIs:</p> <ul style="list-style-type: none"> POST/carts/{cartId}/items PATCH/ carts/{cartId}/items DELETE/carts/{cartId}/items
		Catalog APIs	<p>Added documentation for the following API:</p> <ul style="list-style-type: none"> POST/search
		Catalog Setup APIs	<p>Added documentation for the following APIs:</p> <ul style="list-style-type: none"> DELETE/attributes DELETE/attributes/{attributeId} POST/constraint-rules/{ruleId}/conditions POST/attribute-matrices POST/attribute-groups PATCH/attribute-matrices GET/attribute-rules GET/attribute-matrices DELETE/attribute-matrices POST/attribute-matrices PATCH/visibility-rule POST/visibility-rule <p>Updated documentation for the following APIs:</p> <ul style="list-style-type: none"> POST/constraint-rules/{ruleId}/conditions PATCH/constraint-rules/{ruleId}/conditions POST/constraint-rules/{ruleId}/actions PATCH/constraint-rules/{ruleId}/actions

Document	Publication Date	Topic	Description
		Pricing Setup APIs	<p>Added documentation for the following APIs:</p> <ul style="list-style-type: none"> DELETE/rules/{ruleId}/rule-entries GET/matrices GET/matrices/{matrixId}/matrix-entries GET/price-dimensions <p>Updated documentation for the following APIs:</p> <ul style="list-style-type: none"> POST/price-dimensions POST/price-lists POST/price-lists/{priceListId}/prices POST/rule-sets POST/rule-sets/{ruleSetId}/rules POST/rules/{ruleId}/rule-entries DELETE/rules/{ruleId}/rule-entries
		Settings APIs	New topic
		Use Case: Interacting with the Cart	New topic
		Use Case: Retrieving Product Details	New topic



October '22

Document	Publication Date	Topic	Description
October '22	 07 Oct 2022	Cart APIs	New topic.
		Catalog APIs	Added documentation for attributes in the GET/products/{productId} API.

Document	Publication Date	Topic	Description
		Catalog Setup APIs	<p>Added documentation for the following APIs:</p> <ul style="list-style-type: none"> • <code>POST/attribute-rules</code> • <code>POST/attribute-rules/{attributeRuleId}/actions</code> • <code>PATCH/attribute-rules</code> • <code>PATCH/attribute-rules/{attributeRuleId}/actions</code> • <code>DELETE/attribute-rules</code> • <code>PATCH/attribute-groups</code> • <code>POST/attribute-groups</code> • <code>DELETE/attribute-groups</code> • <code>POST/products/{productId}/attribute-groups</code> • <code>DELETE/products/{productId}/attribute-groups</code> • <code>POST/product-option-group/{productOptionGroupId}/products</code> • <code>DELETE/product-optiongroup{productOptionGroupId}/products</code>

Document	Publication Date	Topic	Description
		Pricing Setup APIs	<ul style="list-style-type: none"> Updated the description of the <code>POST/api/admin/v1/matrices</code> API. Added documentation for the following APIs: <ul style="list-style-type: none"> <code>DELETE/matrices</code> <code>GET/rule-sets</code> <code>POST/api/admin/v1/rule-sets</code> <code>PATCH/api/admin/v1/rule-sets</code> <code>DELETE/rule-sets</code> <code>GET/rule-sets/{ruleSetId}/rules</code> <code>POST/api/admin/v1/rule-sets/{ruleSetId}/rules</code> <code>PATCH/api/admin/v1/rule-sets/{ruleSetId}/rules</code> <code>DELETE/rule-sets/{ruleSetId}/rules</code> <code>POST/matrices/{matrixId}/matrix-entries</code> <code>PATCH/matrices/{matrixId}/matrix-entries</code> <code>DELETE/matrices/{matrixId}/matrix-entries</code> <code>POST/price-dimensions</code> <code>PATCH/price-dimensions</code> <code>DELETE/price-dimensions</code> <code>GET/rules/{ruleId}/rule-entries</code> <code>POST/rules/{ruleId}/rule-entries</code> <code>PATCH/rules/{ruleId}/rule-entries</code>
		Order APIs	New topic

September '22

Document	Publication Date	Topic	Description
September '22	 26 Sep 2022	Order APIs	Removed the topic.
	 07 Sep 2022	All topics	New guide

CPQ for Administrators

This section explains how to configure CPQ on Conga Platform. This section describes the administrative tasks to be performed to enable the features in CPQ and covers the most common use cases for CPQ administration.

Select one of the following topics for more information:

- [Supported Features in CPQ](#)
- [Setting up Salesforce Org with Conga Cloud Instance for CPQ](#)
- [Revenue Admin User Interface](#)
- [Customizing CPQ on Conga Platform using Callback Classes](#)

Supported Features in CPQ

This section lists the features supported in CPQ on Salesforce and CPQ on Conga Platform:

- [Asset Features](#)
- [Cart Features](#)
- [Catalog Features](#)
- [Config Features](#)
- [Pricing Features](#)

Asset Features

The following asset features are supported in this release:

Feature	Sub-Feature	Supported in Salesforce Classic/Turbo	Supported in Conga Platform (API)	Conga Platform (Runtime-UI)	Conga Platform (Admin-UI)
Features	Get List of Assets	Yes	Yes	Yes	N/A
	Installed products page	Yes	Yes	Yes	N/A
	Search Assets	Yes	Yes	Yes	N/A

Feature	Sub-Feature	Supported in Salesforce Classic/ Turbo	Supported in Conga Platform (API)	Conga Platform (Runtime-UI)	Conga Platform (Admin-UI)
	Pagination	Yes	Yes	Yes	N/A
	Installed products page Setting	Yes	Yes	N/A	Yes
	Hide/Unhide Asset Actions	Yes	Yes	Yes	N/A
	Submenu of Asset Action	Yes	Yes	Yes	N/A
	Primary Attribute	Yes	No	Yes	N/A
	Installed products page: Create, edit, and delete personalized view	Yes	Yes	Yes	N/A
	Assets view	Yes	Yes	N/A	Yes
Terminate	Terminate Standalone without Billing	Yes	Yes	Yes	N/A
	Terminate Bundle-option without Billing	Yes	Yes	Yes	N/A
	Termination editable fields	Yes	Yes	Yes	N/A
	Terminate with Ramp	Yes	Yes	Yes	N/A

Feature	Sub-Feature	Supported in Salesforce Classic/ Turbo	Supported in Conga Platform (API)	Conga Platform (Runtime-UI)	Conga Platform (Admin-UI)
	Terminate with Ramp-bundle option	Yes	Yes	Yes	N/A
Change	Change with Asset pricing	Yes	Yes	Yes	N/A
	Change without Asset pricing	Yes	Yes	Yes	N/A
	Change with Asset pricing criteria	Yes	Yes	Yes	N/A
	Change with Cancel option	Yes	Yes	Yes	N/A
	Change with Charge type criteria	Yes	Yes	Yes	N/A
	Change with Flat Price	Yes	Yes	Yes	N/A
	Change with Price Escalators	No	Yes	Yes	N/A
Renew	Renew with Asset pricing	Yes	Yes	Yes	N/A
	Renew without Asset pricing	Yes	Yes	Yes	N/A
	Renew with Asset pricing criteria	Yes	Yes	Yes	N/A

Feature	Sub-Feature	Supported in Salesforce Classic/ Turbo	Supported in Conga Platform (API)	Conga Platform (Runtime-UI)	Conga Platform (Admin-UI)
	Renew with Renewal Uplift	Yes	Yes	Yes	N/A
	Ramp Renew	Yes	Yes	Yes	N/A
	Renew with Charge type criteria	Yes	Yes	Yes	N/A
	Evergreen, Do Not Renew Concept	Yes	Yes	Yes	N/A
	Renew with Attributes	Yes	Yes	Yes	N/A
	Renew with Price Escalator	No	Yes	Yes	N/A
Resume	Resume API Signature	No	Yes	No	N/A
Suspend	Suspend API Signature	No	Yes	No	N/A
Swap	Support for Swap	Yes	Yes	Yes	N/A
Miscellaneous	Delta Summation	Yes	Yes	Yes	N/A
	Asset Line item Callback	No	Yes	N/A	N/A
	Asset Pricing Criteria	Yes	Yes	Yes	N/A

Feature	Sub-Feature	Supported in Salesforce Classic/ Turbo	Supported in Conga Platform (API)	Conga Platform (Runtime-UI)	Conga Platform (Admin-UI)
	Change:Configuration	Yes	Yes	Yes	N/A
	Change:Quantity only positive Quantity	Yes	Yes	Yes	N/A
	Delta Price Adjustments	Yes	Yes	Yes	N/A
	Change:Quantity only decrement Quantity	No	Yes	Yes	N/A
	Data Model Creation	N/A	Yes	N/A	N/A
	Asset Attribute forward sync from SFDC to Platform	NA	Yes	Yes	N/A
	All ABO operations with attribute	Yes	Yes	Yes	N/A
	Advanced Change and Renew Use cases	Yes	Yes	Yes	N/A
Auto Renewals	Auto Renewals	Yes	Oct '24 +	Oct '24 +	Oct'24

Feature	Sub-Feature	Supported in Salesforce Classic/ Turbo	Supported in Conga Platform (API)	Conga Platform (Runtime-UI)	Conga Platform (Admin-UI)
Auto Renewals Integration to Platform	Auto Renewals Integration to Platform	No	Oct '24 +	Oct '24 +	N/A
On-demand Renewals	On-demand Renewals	Yes	Feb '25 +	Feb '25 +	Feb '25 +
Change: Split	Change: Split	Yes	Feb '25 +	Feb '25 +	N/A
Change: Marge	Change: Marge	No	Feb '25 +	Feb '25 +	N/A
Relate	Relate	No	Feb '25 +	Feb '25 +	N/A
Relate Component	Relate Component	No	Feb '25 +	Feb '25 +	N/A

Cart Features

The following cart features are supported in this release:

Feature	Sub-Feature	Supported in Salesforce Classic/ Turbo	Supported on Conga Platform (API)	Supported on Conga Platform (UI)
Launch Cart	Create New Cart	Yes	Yes	Yes
	Launch Saved Cart	Yes	Yes	Yes
	Reconfigure Finalized Cart	Yes	Yes	Yes
Checkout	Checkout to Quote	Yes. Supported in Digital Commerce.	Yes	Yes. Supported in Digital Commerce.
	Checkout to Order	Yes. Supported in Digital Commerce.	Yes	Yes. Supported in Digital Commerce.
Activate Cart	Activate Cart	Yes	Yes	Yes
Cart Size	Upto 100 Line Items	Yes	Yes	Yes
	Upto 500 Line Items	Yes	Yes	Yes
	Upto 2000 Line Items	Yes	Yes	Yes
	Upto 5000 Line Items	No	Yes	Yes
	Upto 10000 Line Items	No	Yes	Yes
	Upto 25000 Line Items	No	No	No
Summary Group	Charge Type	Yes	Yes	Yes

Feature	Sub-Feature	Supported in Salesforce Classic/ Turbo	Supported on Conga Platform (API)	Supported on Conga Platform (UI)
	Frequency	Yes	Yes	Yes
	Category	Yes	Yes	Yes
	Product (Product Fields)	Yes	Yes	Yes
	Ad-hoc (Line Item Fields)	Yes	Yes	Yes
Clone Cart	Clone Cart	Yes	Yes	Yes
Filter Cart Lines	Cart Basic Search	Yes	Yes	Yes, by Product Name.
	Cart Advanced Search	Yes	Yes	Yes
Abandon Cart	Abandon with Cart Deletion	Yes	Yes	Yes
	Abandon with Status Change	Yes	Yes	No
Cart Actions	Copy Cart Lines	Yes	Yes	Yes
	Delete Cart Lines	Yes	Yes	Yes
	Mass Update	Yes	Yes *	Yes *
				Supports a maximum of 500 lines
	Add More Products	Yes	Yes	Yes
	Close Cart	Yes	Yes	Yes

Feature	Sub-Feature	Supported in Salesforce Classic/ Turbo	Supported on Conga Platform (API)	Supported on Conga Platform (UI)
	Save Cart	Yes	Yes	Yes
Cart Grid Feature	Display Column support	Yes	Yes	Yes
	Display Action Support	Yes	Yes	Yes
	Reordering Line Items	Yes	Yes	Yes
	Tool Tip	Yes	Yes	Yes
	Adjust column Width	Yes	Yes	Yes
	Pagination & Infinite Scroll (Lazy Loading)	Yes	Yes	Yes
Cart View	Create New View	Yes	Yes. Supports group by product.	Yes. Supports group by product.
	Update Existing View	Yes	Yes	Yes
	Delete Cart View	Yes	Yes	Yes
Cart Flow	Support Custom Cart Flow	Yes	Yes	Yes
Cart Lookup Field Support	Cart Lookup Field Support	Yes	No	No
Extensibility	Custom Field Support for Cart Lines	Yes	Yes	Yes

Feature	Sub-Feature	Supported in Salesforce Classic/ Turbo	Supported on Conga Platform (API)	Supported on Conga Platform (UI)
	Formula Field On Line Item	Yes	Yes	Yes
	Formula Field on Summary Group	Yes	No	No
	Custom Field on Summary Group	Yes	Yes	Yes
Launch the Cart with Parameters	FlowName	Yes	Yes	Yes
	isCartTotalingDisabled	Yes	Yes	Yes
	styleSheetURL	Yes	Yes	Yes
	Mode (For Readonly)	Yes	No	Yes
	asyncFinalize	Yes	No	No
	productOrderByClause	Yes	Yes	Yes
	useAdvancedApproval (Approval Check) / SkipApprovalCheck	Yes	Yes	Yes
	useAdvancedCurrency	Yes	No	No
	useDealOptimizer	Yes	Yes	Yes
Finalize Cart	Sync Finalize	Yes	Yes	Yes

Feature	Sub-Feature	Supported in Salesforce Classic/ Turbo	Supported on Conga Platform (API)	Supported on Conga Platform (UI)
	Async Finalize	Yes	No	Yes
Quote Summary On the cart	Quote Summary On the cart	Yes	Yes	Yes
Product Summary On Cart	Product Summary On Cart	Yes	Yes	Yes
Mini Cart	Pricing Progress in Mini Cart	Yes	Yes	Yes
	Remove Products from Mini Cart	Yes	Yes	Yes
	By-pass Shopping Cart	Yes	Yes	Yes
	Configure Mini Cart View	Yes	Yes	Yes
	Pagination	Yes	Yes	Yes
	Finalize From MiniCart	Yes	Yes	Yes
Cart Revalidation	Revalidate Cart for Product Changes	Yes	Yes	Yes
	Revalidate Cart for Pricing Changes	Yes	Yes	Yes
	Revalidation Callback	Yes	Yes	Yes

Feature	Sub-Feature	Supported in Salesforce Classic/ Turbo	Supported on Conga Platform (API)	Supported on Conga Platform (UI)
Callbacks	Display Action Callback	Yes	Yes	Yes
	Validation Callback	Yes	Yes	Yes
Approvals	Line Level Approval	Yes	No	Yes
	Cart Level Approval	Yes	No	Yes
Deal Guidance	Deal Guidance	Yes	Yes	Yes
Cart Collaboration	Cart Collaboration	Yes	No	No
Express Proposal	Express Proposal	Yes	No	No
Cart Locking (Concurrent Access)	Cart Locking (Concurrent Access)	Yes	No	No
Recommended Product	View Recommended Product	Yes	Yes	Yes
	Add Recommended Product	Yes	Yes	Yes
Locale Support	Metadata Translation	Yes	No	Yes
	CPQ Data Translation	Yes	Yes	Yes

Feature	Sub-Feature	Supported in Salesforce Classic/ Turbo	Supported on Conga Platform (API)	Supported on Conga Platform (UI)
Create Favorite	Create/Save Favorite	Yes	Yes	Yes
Expand/ Collapse Bundle	Expand/Collapse specific Bundles	Yes	No	Yes

Catalog Features

The following catalog features are supported in this release:

Feature	Sub-Feature	Supported in Salesforce Classic/ Turbo	Supported in Conga Platform (API)	Supported in Conga Platform (Catalog UI)
Categories	Category	Yes	Yes	Yes
	Sub-Category	Yes	Yes	Yes
	Category Hierarchy	Yes	Yes	Yes
	Pagination	Yes	Yes	Yes
	Product List	Yes	Yes	Yes
	Default Options	Yes	No	No
	Product Information	Yes	Yes	Yes
	Product Fields	Yes	Yes	Yes
	Product Pricing	Yes	Yes	Yes

Feature	Sub-Feature	Supported in Salesforce Classic/ Turbo	Supported in Conga Platform (API)	Supported in Conga Platform (Catalog UI)
	Filter Category	Yes	Yes	Yes
	Visibility Rules	Yes	Yes	Yes
Search	Search All Products	Yes	Yes	Yes
	Search All Categories	Yes	Yes	Yes
	Search Category	Yes	Yes	Yes
	Filter Search Results	Yes	Yes	Yes
	Typeahead	Yes (Smart Search)	Yes	No
Actions	Add to Cart	Yes	Yes	Yes
	Add Multiple to Cart	Yes	Yes	Yes
	Configure	Yes	Yes	Yes
	Compare Products	Yes	Yes	Yes
Favorites	Favorites Category	Yes	NA	Yes
	Display Favorites	Yes	Yes	Yes
	Search Favorites	Yes	Yes	Yes
	Filter Favorites	Yes	Yes	Yes
	Add Favorite	Yes	Yes	Yes
	Delete Favorite	Yes	Yes	Yes

Feature	Sub-Feature	Supported in Salesforce Classic/ Turbo	Supported in Conga Platform (API)	Supported in Conga Platform (Catalog UI)
	Publish Favorite	Yes	Yes	Yes
	Exclude Adjustments	Yes	Yes	Yes
Other	Add Another	Yes	Yes	Yes
	Sold as Option	Yes	Yes	Yes
	Must Configure	Yes	Yes	Yes
	Apply Inclusion Rules	Yes	Yes	Yes
	Apply Exclusion Rules	Yes	Yes	Yes
	Apply Validation Rules	Yes	Yes	Yes
	Apply Recommendation Rules	Yes	Yes	Yes
	Apply Replacement Rules	Yes (server-side constraint rules)	Yes	Yes
	Multi-Language Translation	Yes	Yes	Yes
	Service Catalog	Yes	No	No
Location	Yes	Yes	Yes	

Config Features

The following config features are supported in this release:

Feature	Sub-Feature	Supported in Salesforce Classic	Supported in Conga Platform (API)	Supported in Conga Platform (Config-UI)
Inclusion Constraint Rules	Product Scope	Yes	Yes	Yes
	Product Group Scope	Yes	Yes	Yes
	Product Family Scope	Yes	Yes	Yes
	Product Field Set	Yes	Yes	Yes
	Condition Criteria	Yes	Yes	Yes
	Action Criteria	Yes	Yes	Yes
	Option Group Scope (condition)	Yes	Yes	No
	Match in Primary Lines	Yes	Yes	Yes
	Match in Options	Yes	Yes	Yes
	Match in Cart Options	Yes	Yes	Yes
	Match in Location	Yes	Yes	Yes
	Match in Related Lines	Yes	No	No
	Match in Service Asset	Yes	No	No
	Match in Asset	Yes	Yes	Yes
Repeat Inclusion	No	No	No	

Feature	Sub-Feature	Supported in Salesforce Classic	Supported in Conga Platform (API)	Supported in Conga Platform (Config-UI)
	Is Bundle Context	Yes	Yes	Yes
	Min/Max Rule	Yes	Yes	Yes
Exclusion Constraint Rules	Product Scope	Yes	Yes	Yes
	Product Group Scope	Yes	Yes	Yes
	Product Family Scope	Yes	Yes	Yes
	Product Field Set	Yes	Yes	Yes
	Condition Criteria	Yes	Yes	Yes
	Action Criteria	Yes	Yes	Yes
	Option Group Scope (condition)	Yes	Yes	Yes
	Match in Primary Lines	Yes	Yes	Yes
	Match in Options	Yes	Yes	Yes
	Match in Cart Options	Yes	Yes	Yes
	Match in Location	Yes	Yes	Yes
	Match in Related Lines	Yes	No	No
	Match in Service Asset	Yes	No	No
	Match in Asset	Yes	Yes	Yes
Repeat Inclusion	No	No	No	
Is Bundle Context	Yes	Yes	Yes	

Feature	Sub-Feature	Supported in Salesforce Classic	Supported in Conga Platform (API)	Supported in Conga Platform (Config-UI)
	Min/Max Rule	Yes	Yes	Yes
Validation Constraint Rules	Product Scope	Yes	Yes	Yes
	Product Group Scope	Yes	Yes	Yes
	Product Family Scope	Yes	Yes	Yes
	Product Field Set	Yes	Yes	Yes
	Condition Criteria	Yes	Yes	Yes
	Action Criteria	Yes	Yes	Yes
	Option Group Scope (condition)	No	No	No
	Match in Primary Lines	Yes	Yes	Yes
	Match in Options	Yes	Yes	Yes
	Match in Cart Options	Yes	Yes	Yes
	Match in Location	Yes	Yes	Yes
	Match in Related Lines	Yes	No	No
	Match in Service Asset	Yes	No	No
	Match in Asset	Yes	No	No
	Repeat Inclusion	No	No	No
Is Bundle Context	Yes	Yes	Yes	

Feature	Sub-Feature	Supported in Salesforce Classic	Supported in Conga Platform (API)	Supported in Conga Platform (Config-UI)
	Min/Max Rule	Yes	Yes	Yes
Replacement Constraint Rules	Product Scope	Yes*	Yes	Yes
	Product Group Scope	Yes*	Yes	Yes
	Product Family Scope	Yes*	Yes	Yes
	Product Field Set	Yes*	Yes	Yes
	Condition Criteria	Yes*	Yes	Yes
	Action Criteria	Yes*	Yes	Yes
	Option Group Scope (condition)	No	Yes	Yes
	Match in Primary Lines	Yes*	Yes	Yes
	Match in Options	Yes*	Yes	Yes
	Match in Cart Options	Yes*	Yes	Yes
	Match in Location	No	No	No
	Match in Related Lines	No	No	No
	Match in Service Asset	No	No	No
	Match in Asset	No	No	No
	Repeat Inclusion	No	No	No
	Is Bundle Context	Yes*	Yes	Yes
Min/Max Rule	Yes*	Yes	Yes	

Feature	Sub-Feature	Supported in Salesforce Classic	Supported in Conga Platform (API)	Supported in Conga Platform (Config-UI)
Recommendation Constraint Rules	Product Scope	Yes	Yes	Yes
	Product Group Scope	Yes	Yes	Yes
	Product Family Scope	Yes	Yes	Yes
	Product Field Set	Yes	Yes	Yes
	Condition Criteria	Yes	Yes	Yes
	Action Criteria	Yes	Yes	Yes
	Option Group Scope (condition)	Yes	No	No
	Match in Primary Lines	Yes	Yes	Yes
	Match in Options	Yes	Yes	Yes
	Match in Cart Options	Yes	Yes	Yes
	Match in Location	Yes	Yes	Yes
	Match in Related Lines	Yes	No	No
	Match in Service Asset	Yes	No	No
	Match in Asset	Yes	Yes	No
	Repeat Inclusion	No	No	No
Is Bundle Context	Yes	Yes	Yes	
Min/Max Rule	Yes	Yes	Yes	

Feature	Sub-Feature	Supported in Salesforce Classic	Supported in Conga Platform (API)	Supported in Conga Platform (Config-UI)
Option Configuration	Option Selection/ De-selection	Yes	Yes	Yes
	View Bundle Hierarchy	Yes	Yes	Yes
	Min/Max Options	Yes	Yes	Yes
	Min/Max Total Quantity	Yes	Yes	Yes
	Is Hidden	Yes	Yes	Yes
	Is Picklist	Yes	Yes	Yes
	Modifiable Type	Yes	Yes	Yes
	Option Sequencing	Yes	Yes	Yes
	Default / Required Option	Yes	Yes	Yes
	Inclusion criteria	No*	No	No
	Min/Max Quantity	Yes	Yes	Yes
	Quantity: Default, Modifiable	Yes	Yes	Yes
	Quantity: Auto Update	Yes	No	No
	Allow Cloning	Yes	Yes	Yes
	Config Type	Yes	Yes	Yes
Auto-Adjust Price	Yes	No	No	

Feature	Sub-Feature	Supported in Salesforce Classic	Supported in Conga Platform (API)	Supported in Conga Platform (Config-UI)
Product Attributes Display	Attribute: Read-Only, Hidden, Primary	Yes	Yes	Yes
	Two-column Attribute Display	Yes	Yes	Yes
	Three column Attribute Display	Yes	Yes	Yes
Product Attribute Rules	Product Scope: Product, Product Family, Product Group	Yes	Yes	Yes
	Filter Criteria	Yes	Yes	Yes
	Action Types: Allow, Default, Hidden, Disabled, Required, Reset	Yes	Yes. Supports the following Action Types for Product group and product family: <ul style="list-style-type: none"> • Hidden • Required • Reset 	Yes
	Target Field: Product Attribute Value, Line Item, Product, Pricelist, Product Configuration	Yes	Yes. Supports Product Attribute only.	Yes. Supports Product Attribute only.
Attribute Value Matrices	Product Scope: Product, Product Family, Product Group, Location	Yes	Yes	Yes

Feature	Sub-Feature	Supported in Salesforce Classic	Supported in Conga Platform (API)	Supported in Conga Platform (Config-UI)
	Application Type: Default, Constraint, Force Set	Yes	Yes	Yes
Field Expressions / Rollup	Evaluation Context: Constraint Rule action, Record Update, Default Quantity, Rollup	Yes	Yes	Yes
	Update Product Attribute and Line Item object fields	Yes	Yes	Yes
	Rollup Group By Field: Line Item, Product Attribute	Yes	Yes	Yes
Callbacks	Option Filter Callback	Yes	Yes	Yes
Other	Formula field support (Condition/action)	Yes	Yes (Conga Platform)	No
	Lookups (For example, Attributes)	Yes	Yes (Conga Platform)	No
	TurboPricing Integration	Yes	No	No
	ABO Flow support	Yes	No	No
	Service CPQ	Yes	No	No
	Multi-language support: For products & categories	Yes	No	No
	Unified Cart	No	No	No

Pricing Features

The following pricing features are supported in this release:

Feature	Sub-feature	Turbo Pricing	Conga Platform (API)	Conga Platform (Cart-UI)	Conga Platform (Admin-UI)
Pricing Calculation:					
Pricing	Bundle Product Pricing, Standalone Product Pricing with basic details	Yes	Yes	Yes	Yes
	Multiple Charge Types	Yes	Yes	Yes	Yes
	Attribute-Based Pricing	Yes	Yes	Yes	Yes
	Charge Type Criteria	Yes	Yes	Yes	Yes
	Related Pricing	Yes	Yes	Yes	Yes
	Reprice Cart	Yes	Yes	Yes	NA
Frequency	Use of Daily Frequency	No	No Plan to implement.	No Plan to implement.	No Plan to implement.

Feature	Sub-feature	Turbo Pricing	Conga Platform (API)	Conga Platform (Cart-UI)	Conga Platform (Admin-UI)
	Use of Weekly Frequency	No	No Plan to implement.	No Plan to implement.	No Plan to implement.
	Use of Frequencies Monthly, Quarterly, Half Yearly, Yearly	Yes	Yes	Yes	Yes
Price Dimensions		Yes	Yes	Yes	Yes
Manual Adjustments	Providing Manual Adjustments with different Adjustment Types	Yes	Yes	Yes	Yes
Auto-applied Adjustments	Price Matrices	Yes	Yes	Yes	Yes
	Price Rulesets	Yes	Yes	Yes	Yes
Multiple adjustments	Multiple Adjustments on the Cart Line Items	Yes	Yes	Yes	NA

Feature	Sub-feature	Turbo Pricing	Conga Platform (API)	Conga Platform (Cart-UI)	Conga Platform (Admin-UI)
Group Adjustment Spread		Yes	Yes	Yes	NA
Price List	Standard Price List	Yes	Yes	Yes	Yes
	Contract Price List	Yes	Yes	Yes	Yes
	Based on Price List	Yes	Yes	Yes	Yes
Cart Actions	Copy Products	Yes	Yes	Yes	NA
	Mass Update	Yes	Yes	Yes	NA
	Favorites	Yes	Yes	Yes	NA
Pricing Information	Summary Group Information	Yes	Yes	Yes	NA
	Price Break-up Information- Related Pricing	Yes	Yes	Yes	NA

Feature	Sub-feature	Turbo Pricing	Conga Platform (API)	Conga Platform (Cart-UI)	Conga Platform (Admin-UI)
	Price Break-up Information- Usage Price Tiers	Yes	Yes	Yes	NA
Usage Price Tiers		Yes	Yes	Yes	Yes
Default Quantity	Defaulting quantity for Bundles/ Multiple Charges	Yes	Yes	Yes	Yes
Default Term	Defaulting term for Bundles/ Multiple Charges	Yes	Yes	Yes	Yes
Default Quantity from	Defaulting Quantity from Product Attribute, Product Configuration and Advanced Formula	Yes	Yes	Yes	Yes

Feature	Sub-feature	Turbo Pricing	Conga Platform (API)	Conga Platform (Cart-UI)	Conga Platform (Admin-UI)
Default Price from	Defaulting Price from Product Attribute and Advanced Formula	Yes	Yes	Yes	Yes
Auto-cascade Selling term and Quantity	Auto-cascade Selling Term	Yes	Yes	Yes	Yes
	Auto-cascade Quantity	Yes	Yes	Yes	Yes
Min/Max Price	Min/Max Price Applies to Base Price	Yes	Oct '24 +	Oct '24 +	Oct '24 +
	Min/Max Price Applies to Extended Price	Yes	Oct '24 +	Oct '24 +	Oct '24 +
Proration	Allow Proration	Yes	Yes	Yes	Yes
Price Method	Use of Tiered Rates	Yes	Yes	Yes	Yes

Feature	Sub-feature	Turbo Pricing	Conga Platform (API)	Conga Platform (Cart-UI)	Conga Platform (Admin-UI)
	Defer Pricing	Yes	No Plan to implement.	No Plan to implement.	No Plan to implement.
	Per Unit Price method	Yes	Yes	Yes	Yes
	Flat price Price method	Yes	Yes	Yes	Yes
Price Type	Price Type - One Time	Yes	Yes	Yes	Yes
	Price Type - Per unit	Yes	Yes	Yes	Yes
	Price Type - Usage	Yes	Yes	Yes	Yes
	Price Type - Recurring	Yes	Yes	Yes	Yes
Price Ramps	Auto Price Ramp Creation for - Bundle, Options and Standalone Products	Yes	Yes	Yes	NA

Feature	Sub-feature	Turbo Pricing	Conga Platform (API)	Conga Platform (Cart-UI)	Conga Platform (Admin-UI)
	Create Price Ramps for Only options within the Bundle	Yes	Yes	Yes	NA
	Update Price Ramps	Yes	Yes	Yes	NA
	Delete Price Ramps	Yes	Yes	Yes	NA
	Allow Price Ramp Overlap	Yes	Yes	Yes	NA
	Price Escalator	Yes	Yes	Yes	Yes
	Price Ramps for Product with Related Pricing	Yes	Yes	NA	NA

Feature	Sub-feature	Turbo Pricing	Conga Platform (API)	Conga Platform (Cart-UI)	Conga Platform (Admin-UI)
	Price Ramps with Custom Frequencies	Yes	Yes	NA	NA
Multi-currency	Use of Multi-Currencies	Yes	Yes	Yes	NA
	Use of Dated Exchange Rates	Yes	NA	NA	NA
	Disable Currency Conversion Rate for a Price List	Yes	Yes	Yes	Yes
	Currency conversion enabled at a rule set level	Yes	Yes	Yes	Yes
Cost Model		No	Oct '24 +	Oct '24 +	Oct '24 +
Price Waterfall	Manage Price Waterfall (Pipeline)	Yes	Yes	Yes	Yes

Feature	Sub-feature	Turbo Pricing	Conga Platform (API)	Conga Platform (Cart-UI)	Conga Platform (Admin-UI)
	Manage Price Waterfall Ruleset	Yes	Yes	Yes	Yes
	Total/Summary level Waterfall	No Plan to implement.	Oct '24	Oct '24	Oct '24
UOM/ Frequency Conversion	Frequency Conversion	Yes	Oct '24 +	Oct '24 +	Oct '24 +
	Use of UOM Conversions	Yes	Oct '24 +	Oct '24 +	Oct '24 +
	Use of Product specific conversion rates	Yes	Oct '24 +	Oct '24 +	Oct '24 +
	Use of Product Family-specific conversion rates	No	No Plan to implement.	No Plan to implement.	No Plan to implement.

Feature	Sub-feature	Turbo Pricing	Conga Platform (API)	Conga Platform (Cart-UI)	Conga Platform (Admin-UI)
Creation of Contract PL runtime		Yes	Oct '24	Oct '24	NA
Promotions:					
Create Promotions	Different Promotions Types and with different field details	Yes	Yes	NA	Yes
	-Buy X Get X				
	-Buy X Get Y				
	-For Every X, Get X				
-For Every X, Get Y					

Configure Price Quote (CPQ)

Feature	Sub-feature	Turbo Pricing	Conga Platform (API)	Conga Platform (Cart-UI)	Conga Platform (Admin-UI)
	Line Item Promotions	Yes	Yes	NA	Yes
	Summary Group Promotions	Yes	Yes	NA	Yes
	Scope	Yes	Yes	NA	Yes
	Criteria	Yes	Yes	NA	Yes
	Benefits	Yes	Yes	NA	Yes
	Limits	Yes	Yes	NA	Yes
Coupons		Yes	Yes	NA	Yes
Sales Promotions		No Plan to implement.	Feb '25+	Feb '25+	Feb '25+
Update Promotions/ Coupons		Yes	Yes	NA	Yes
Delete Promotions/ Coupons		Yes	Yes	NA	Yes

Feature	Sub-feature	Turbo Pricing	Conga Platform (API)	Conga Platform (Cart-UI)	Conga Platform (Admin-UI)
Apply Promotions/ Coupons	Apply Promotions	Yes	Yes	Yes	NA
	Apply Coupons	Yes	Yes	Yes	NA
Remove Promotions/ Coupons	Remove Promotions	Yes	Yes	Yes	NA
	Remove Coupons	Yes	Yes	Yes	NA
Approval	Approval check of Cart and line item approval	Yes	Yes	Yes	NA
	My Approval Dashboard	Yes	Yes	Yes	NA
	Approve/Reject/Reassign Approvals	Yes	Yes	Yes	NA
	Quote Approval on Conga platform	Yes	Oct' 24 +	Oct' 24 +	NA

Feature	Sub-feature	Turbo Pricing	Conga Platform (API)	Conga Platform (Cart-UI)	Conga Platform (Admin-UI)
Callbacks:					
Callbacks	Pricing Callback	Yes	Yes	Yes	NA
	Product Filter Callback	Yes	Yes	Yes	NA
	Recommendation Callback	Yes	Yes	Yes	NA
	Adjustment Spread Callback	No	Yes	Yes	NA
	Adjustment line item callback	Yes	Yes	Yes	NA
	Product Attribute Callback	No	Yes	Yes	NA
	Related Pricing Callback	Yes	Yes	Yes	NA
	Display Action Callback	Yes	Yes	Yes	NA

Feature	Sub-feature	Turbo Pricing	Conga Platform (API)	Conga Platform (Cart-UI)	Conga Platform (Admin-UI)
	Action Callback	Yes	Oct '24	Oct '24	NA
	Validation Callback	Yes	Yes	Yes	NA
	Action Invoker Callback Class	No	NA	NA	NA
	Revalidation Callback Class	No	Yes	Yes	NA
	AssetLineItem Callback Class	No	Yes	Yes	NA
	Quote life cycle Callback Class	No	Oct'24 +	Oct '24 +	NA
Custom Fields	Support for Custom Field as Price Dimension in Price Matrices & Price Rule sets	Yes	Yes	Yes	NA

Configure Price Quote (CPQ)

Feature	Sub-feature	Turbo Pricing	Conga Platform (API)	Conga Platform (Cart-UI)	Conga Platform (Admin-UI)
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Support for Custom Field used as Charge type Criteria, Ruleset Header Criteria, Criteria based price matrices, Criteria based price rules

Yes

Yes

Yes

NA

Feature	Sub-feature	Turbo Pricing	Conga Platform (API)	Conga Platform (Cart-UI)	Conga Platform (Admin-UI)	Support for Custom Field used as Constraints in Rule Criteria	Y	Y	Y	N/A

Feature	Sub-feature	Turbo Pricing	Conga Platform (API)	Conga Platform (Cart-UI)	Conga Platform (Admin-UI)					Promotions and Advanced criteria in promotions				

Feature	Sub-feature	Turbo Pricing	Conga Platform (API)	Conga Platform (Cart-UI)	Conga Platform (Admin-UI)					
	Display Custom Field on UI (Line item, Adjustmen t Line Item, Price Breakup, Usage Price Tiers, Summary Group, Config Page).	Yes	Yes	Yes	Yes					
	Formula Fields	Support for Custom Field that is a Formula used as Price Dimension in Price Matrices & Price Rule sets	Yes	Yes	Yes	Yes				

Feature	Sub-feature	Turbo Pricing	Conga Platform (API)	Conga Platform (Cart-UI)	Conga Platform (Admin-UI)	
	Note: Nested formula are not supported on Platform	Support for Custom Field that is a Formula used as Charge type Criteria, Rule set Header Criteria, Criteria based price matrices, Criteria based price rules	Yes	Yes	Yes	Yes

Feature	Sub-feature	Turbo Pricing	Conga Platform (API)	Conga Platform (Cart-UI)	Conga Platform (Admin-UI)	
		Support for Custom Field that is a Formula used as Constraint Rule Criteria	Yes	Yes	Yes	Yes
		Support Custom Field that is a Formula used in pricing callback & other callbacks.	Yes	Yes	Yes	Yes

Feature	Sub-feature	Turbo Pricing	Conga Platform (API)	Conga Platform (Cart-UI)	Conga Platform (Admin-UI)
	Support for Custom Field or Custom Field that is a Formula used as Price dimension in Promotions and Advanced criteria in promotions	Yes	Yes	Yes	Yes
	Display Custom Field that is a Formula on UI (Line item, Adjusted Line Item, Price Breakup, Usage Price Tiers, Summary Group, Config Page).	Yes	Yes	Yes	NA

Feature	Sub-feature	Turbo Pricing	Conga Platform (API)	Conga Platform (Cart-UI)	Conga Platform (Admin-UI)
	Formula Fields support with Adjustment Amount Source	Yes	Oct '24	Oct '24	Oct '24
	Formula Fields support on Related Pricing with Related Adjustment Amount Source	Yes	Oct '24	Oct '24	Oct '24
Custom Object	Support for Custom object	Yes	Yes	NA	Yes
Service Hooks/ Custom Action/ custom pages	Support for Service hooks and custom actions	Yes	Yes	Yes	Yes
Workflow Rules	Support of workflow processes (Basic - MVP)	Yes	Yes	Yes	Yes

Feature	Sub-feature	Turbo Pricing	Conga Platform (API)	Conga Platform (Cart-UI)	Conga Platform (Admin-UI)
	Support of workflow processes (Advanced)	Yes	Yes	Yes	Yes
Deal Maximizer		Yes	Yes	Yes	Yes
Reprice Quote		No	Oct '24 +	Oct '24 +	NA
Data Sync	Master data sync from salesforce to Platform	Yes	Yes	NA	Yes
	Reverse sync from Platform to salesforce on Cart Finalize	Yes	Yes	NA	Yes
	Inflight Cart from salesforce to Platform	Yes	Oct '24	NA	NA

Feature	Sub-feature	Turbo Pricing	Conga Platform (API)	Conga Platform (Cart-UI)	Conga Platform (Admin-UI)
	Favorite Data from Salesforce to Platform	Yes	Oct '24	NA	NA
	Image Data from Salesforce to Platform (Product, Category ec)	Yes	Yes	NA	Yes

Setting up Salesforce Org with Conga Cloud Instance for CPQ

To set up Conga CPQ with the Conga platform, you must perform several configurations for both the Salesforce org and the Conga platform.

An administrator can be any of the following persona: Customer Administrator, Partner Administrator, or any other administrator assigned the responsibility of setting up Salesforce org with the Conga platform. In this topic, this persona is referred to as the Customer Administrator.

The Customer Administrator is responsible for completing the entire setup process with assistance from the Conga CloudOps team.

Order	Task	Owner
1	Tenant Onboarding	This task is owned by the customer administrators and Cloud Ops team. <ul style="list-style-type: none"> • Customer Administrator: Reaches out to the Conga service team to log a service ticket for tenant onboarding. • CloudOps team: Initiates tenant onboarding process based on the service ticket.
2	Configuring Salesforce org	Customer Admin
3	Configuring Conga Platform	Customer Admin
4	Configuring Revenue Admin Settings	Customer Admin

- [Tenant Onboarding](#)
- [Configuring the Salesforce Org](#)
- [Configuring the Conga Platform](#)
- [Configuring Revenue Admin Settings](#)
- [Creating a Quote from the Proposal](#)

Tenant Onboarding

This topic outlines all the necessary steps for tenant onboarding. Both the Conga CloudOps team and customer admin are involved in this process.

Prerequisites

You have provided the following information to your Conga support representative:

- Your 18-digit Salesforce org ID.
- The administrator's first name, last name, and email ID.
- Your Salesforce org domain name. To view the domain details of your Salesforce org, go to Setup > enter `my domain` in the Quick Find box and click **My Domain**.

To onboard a tenant

Generally, your Conga support representative will log a tenant onboarding request with the following details.

- Salesforce org and admin details:
 - Salesforce org ID, the Admin User's first name, last name, and email ID.

On successful onboarding, the admin user receives a confirmation email containing Conga Org details, Conga IDP login credentials, and a one-time password.

To change the password

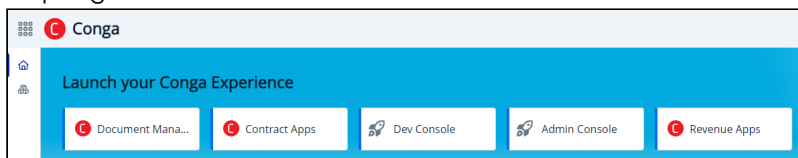
1. Click the Login URL (Go to URL) in the welcome email.
2. Enter the username and password (Password for first-time login) in the welcome email.
3. Click **Sign-in** and follow the on-screen instructions to change the password.

After changing the password, you must configure the external integrations and Conga API connections (API to API connection and UI to API connection) in the Conga platform and generate the client ID and client secret, which you will later use to formulate the client ID and client secret when configuring an auth.provider and SPAClient ID when creating a new admin setting.

To configure the external integration

The External Integration tab allows administrators to view and manage users authorized through external organizations. You can add one or more external integrations; but, you can make only one as a default IDP.

1. Log in to the Conga Platform as an admin user. A Conga Platform welcome page is displayed.



2. Click the **Admin Console** tile. A Platform Administration page is displayed.
3. Click **Organization**.
4. Open the External Integrations tab and click **Add New**, raising the Add New External Integration screen.

5. Choose **Identity Provider** (Salesforce or Salesforce Sandbox) from the drop-down list and click **Authorize**, to open the selected IDP's login screen.
6. Log in with your onboarded Salesforce org credentials.
If you get any access-related prompts during this process, please allow full access. When you log in, the selected identity provider's external identifier auto-populates the External ID field.
7. Enter the type of this integration in the **Type** text field. It is a free-form text field. You can add types such as Dev, QA, UAT, Prod, etc.
8. Add the description.
9. Enable the **Default IDP** toggle to make it a Default External Integration IDP.
10. Click **Save**.

To configure an API to API connection

You must establish an API-to-API connection between your Salesforce org and Conga Platform. This connection ensures seamless communication and data exchange between your Salesforce org and Conga Platform.

1. On the **Organization** page, click the **Conga API Connections** tab and **Add API-to-API Connection**.
2. Enter values in the following fields:



Field	Description
External Integration	Select the respective External Identifier for which you want to configure the connection. The external identifier list is populated based on the External Integrations you added on the External Integrations page.
Client Name	Enter the client's name.
Description	Enter the appropriate description.

3. Click **Save & Generate Client Secret** to generate the Client ID.
4. Click **Copy** next to **Client ID and Client Secret**. Use these details when configuring a new auth. provider.

To configure UI to API connection

1. On the **Organization** page, click the **Conga API Connections** tab and **Add UI-to-API Connection**.

2. Enter values in the following fields:

Field	Description
External Identifier	Select the respective External Integration for which you want to configure the connection. The external identifier list is populated based on the external integrations that you added on the External Integrations page.
Client Name	Enter the client name.
Description	Enter the appropriate description.
Redirect URI	<p>Enter the following RLP cart page URI.</p> <ul style="list-style-type: none"> https://<CustomerOrgDomainName>--conga-ccpq.vf.force.com/apex/RLPCart <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> Ensure the < CustomerOrgDomainName > name is replaced with the actual org domain name. To view the domain details of your Salesforce org, go to Setup > enter my domain in the Quick Find box and click My Domain.</p> </div>
Cors Origins	<p>Enter your Salesforce org's base URL.</p> <ul style="list-style-type: none"> https://<CustomerOrgDomainName>.my.salesforce.com <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> Ensure the < CustomerOrgDomainName > name is replaced with the actual org domain name.</p> </div>
Back Channel Logout URI	Leave the field blank.
Front Channel Logout URI	Leave the field blank.

3. Click **Save & Generate Client Secret** to generate the Client ID.
4. Click **Copy** next to the **Client ID**. This is your SPA Client ID, and use it when Creating a New Admin Setting.

Next Step: [Configuring the Salesforce Org](#)

Configuring the Salesforce Org

After completing tenant onboarding, use the configurations in this section to access new CPQ APIs on the Conga Platform using the Salesforce UI and synchronize data automatically from Salesforce to the Conga Platform. Review the following topics for more information.

 Start with the [Installing Conga CPQ \(RLS\) Package](#) topic and follow the steps for the successful org setup.

- [Installing Conga CPQ \(RLS\) Package](#)
- [Creating a New Admin Setting](#)
- [Creating a New Auth Provider](#)
- [Configuring Remote Site Settings](#)
- [Creating a New Static Resource](#)
- [Creating the Configure Products Button for RLS Flow](#)
- [Enabling OAuth Settings](#)
- [Creating a Connected App](#)
- [Configuring a Deep Clone Button on Proposal](#)
- [Configuring View Cart \(Read Only\) Button on Proposal](#)
- [Configuring My Approval Button on Proposal Detail Page](#)

Installing Conga CPQ (RLS) Package

The Conga CPQ (RLS) package is required to integrate and synchronize your CPQ data with the Conga Platform.

Prerequisites

- Conga Community portal credentials
- Installation key

 Contact the Conga support team for the installation key.

You must verify that the onboarded Salesforce org has all the dependency packages.

To view the installed packages on your Salesforce org

1. Login to your Salesforce org.

2. Go to **Setup** > in the Quick Find box, enter **Installed Packages** and select it. A list of installed packages is displayed.
3. Verify the version number against the packages as mentioned in the following.

Order	Package	Version Number
1	Conga Base Library	4.243 or later
2	Conga Contract Lifecycle Management	14.696 or later
3	Conga Configuration & Pricing	15.2062 or later.
4	Conga Quote Management	13.262 or later.
5	Conga Quote Configuration Integration	15.399 or later

To install or upgrade the dependency packages, refer to the Installing CPQ Packages for the order of the package installation. After ensuring the installation of the above dependant packages, you must install the following package.

Product	Latest Certified Version Name	Latest Certified Version Number
Conga CPQ (RLS) (New)	2.1.80	2.80

To Install the Conga CPQ (RLS) package

Install the latest version of the Conga CPQ (RLS) package. Refer to the latest CPQ on Conga Platform release notes for the packages.

1. Login to the Conga Community portal.
2. Go to **Get Started** > **Install Center**.
3. In the My Packages navigation link, click **CPQ**. A list of CPQ-related packages is displayed.
4. On the CPQ (RLS) tile, click the environment where you want to install the packages. Click **Install in Production** to install the packages in your production environment. Click **Install in Sandbox** to install the packages in your sandbox.
To install any specific version, click **Details** on the package tile, and select the required version > click **Install in Production** to install the packages in your production

environment. Click **Install in Sandbox** to install the packages in your sandbox. A Salesforce login screen is displayed.

5. Enter login credentials and click **Log In**. Use the onboarded Salesforce org login credentials.
6. Enter the installation key provided by Conga.
7. Select the profile for which you want to install the package. Conga recommends that you select **Install for All Users**.
 - **Install for Admins Only:** This is the default setting. Apply this access level to disable all object permissions.
 - **Install for All Users:** Apply this access level to assign users permissions to read, create, edit, delete, view all, and modify all, for all objects in the CPQ package.
 - **Install for Specific Profiles:** Apply this access level to assign permissions to specific users to read, create, edit, delete, view all, and modify all, the pricing-related objects in the CPQ package.
8. Click **Install**.

Next Step: [Creating a New Admin Setting](#).

Creating a New Admin Setting

Admin Settings are system properties that have different values, and you can use them for different purposes. You must configure admin settings to meet the business objectives of your implementation along with Custom Settings.

Field	Description
SPAClientId	A single-page application ID. Enter the SPAClientId that you generated after configuring the UI To API configuration.
OrganizationId (optional)	Enter the Conga Organization ID that you captured after tenant onboarding. To view the organization ID, see the "To capture Conga Organization Display Name and Organization ID" section in Tenant Onboarding .
OrganizationFriendlyId (optional)	Your Conga organization's friendly ID. Friendly ID is formatted as <Conga org display name-org Id>. For more information, see the "To capture Conga Organization Display Name and Organization ID" section in Tenant Onboarding .
UserId (optional)	Enter the user ID that is created on the Conga Platform. To view the user ID on the Conga Platform, log in to Conga Platform as administrator, then go to Admin Console > Users > Click on the desired username.

Field	Description
InstanceURL	<p>Conga organization instance URL. Use any of the following URLs per your Conga instance:</p> <ul style="list-style-type: none"> • For production instance: <ul style="list-style-type: none"> • NA: https://prod-rls10.congacloud.com • EU: https://login.congacloud.eu/ • AU: https://login.congacloud.au/ • For Preview instance: <ul style="list-style-type: none"> • NA: https://preview-rls09.congacloud.com • EU: https://rls-preview.congacloud.eu/ • AU: https://rls-preview.congacloud.au/ • For staging instance: https://rls-stg.congacloud.io • For qa instance: https://rls-qa.congacloud.io • For dev instance: https://rls-dev.congacloud.io
UIInstanceURL	<p>Conga Organization UI instance URL. Use any of the following URLs per your Conga instance:</p> <ul style="list-style-type: none"> • For production instance: <ul style="list-style-type: none"> • NA: https://prod-rls10.congacloud.com/ecpqui • EU: https://login.congacloud.eu/ecpqui • AU: https://login.congacloud.eu/ecpqui • For preview instance: <ul style="list-style-type: none"> • NA: https://preview-rls09.congacloud.com/ecpqui • EU: https://rls-preview.congacloud.eu/ecpqui • AU: https://rls-preview.congacloud.au/ecpqui • For staging instance: https://rls-stg.congacloud.io/ecpqui • For qa instance: https://rls-qa.congacloud.io/ecpqui • For dev instance: https://rls-dev.congacloud.io/ecpqui

Field	Description
UpsertQuotesEndpointURL	<p>The upsert quotes URL.</p> <ul style="list-style-type: none"> For production instance: <ul style="list-style-type: none"> NA: https://prod-rls10.congacloud.com/api/quote/v1/quotes/upsert-quote EU: https://login.congacloud.eu/api/quote/v1/quotes/upsert-quote AU: https://login.congacloud.au/api/quote/v1/quotes/upsert-quote For preview instance: <ul style="list-style-type: none"> NA: https://preview-rls09.congacloud.com/api/quote/v1/quotes/upsert-quote EU: https://rls-preview.congacloud.eu/api/quote/v1/quotes/upsert-quote AU: https://rls-preview.congacloud.au/api/quote/v1/quotes/upsert-quote For staging instance: https://rls-stg.congacloud.io/api/quote/v1/quotes/upsert-quote For qa instance: https://rls-qa.congacloud.io/api/quote/v1/quotes/upsert-quote For dev instance: https://rls-dev.congacloud.io/api/quote/v1/quotes/upsert-quote
LoginURL	<p>Your Conga Platform login URL.</p> <ul style="list-style-type: none"> For Production instance: <ul style="list-style-type: none"> NA: https://login-rls.congacloud.com/ EU: https://login-rls.congacloud.eu/ AU: https://login-rls.congacloud.au/ For preview instance: <ul style="list-style-type: none"> NA: https://login-rlspreview.congacloud.com/ EU: https://login-rlspreview.congacloud.eu/ AU: https://login-rlspreview.congacloud.au/ For staging instance: https://login-rlsstg.congacloud.io For qa instance: https://login-rlsqa.congacloud.io For dev instance: https://login-rlsdev.congacloud.io
<p>Enter the following endpoints only when you use X-Author for Excel, Conga Sign, and Composer applications along with CPQ. These endpoints are specific to the connected environment. Reach out to the Conga CloudOps team for the endpoints.</p>	
XAEndpoint	<p>For production: https://xauthor-prod-rls10.congacloud.com</p> <p>For preview environment:</p> <p>For staging environment: https://xauthor-stg.congacloud.io</p>
SignEndpoint	https://coreapps-rlspreview.congacloud.com

Field	Description
ComposerEndpoint	https://coreapps-rlspreview.congacloud.com

To configure a new admin entry

1. Click the **App Launcher** icon (☰), enter Admin, and select Admin.
2. Click **New**.
3. Enter the following details:

Field	Value
Name	APTS_RLPInstanceSettings
Value	Leave this field blank.
Code	<p>Enter the code. Below is an example of a code whose values are specific to the connected/preview environment.</p> <pre> { "SPAClientId": "technicalpublicationteam-spa", "OrganizationId": "c7552ce4-a380-45b0-9c8a-022d2eafa7df", "OrganizationFId": "auert00000004wfoai-c7552ce4-a380-45b0-9c8a-022d2eafa7df", "UserId": "769d5e44-ef45-cb0d-dd3c-1f046feded1c", "InstanceURL": "https://preview-rls09.congacloud.com", "UIInstanceURL": "https://preview-rls09.congacloud.com/ecpqui", "UpsertQuotesEndpointURL": "https://preview-rls09.congacloud.com/api/quote/v1/quotes/upsert-quote", "LoginURL": "https://login-rlspreview.congacloud.com", "XAEndpoint": "https://xauthor-stg.congacloud.io", "SignEndpoint": "https://coreapps-rlspreview.congacloud.com", "ComposerEndpoint": "https://coreapps-rlspreview.congacloud.com" } </pre>

4. Click **Save**. Your new admin setting is saved and added.

Next Step: [Create a new Auth. Provider](#)

Creating a New Auth Provider

Authentication providers allow you to configure external identity providers to authenticate users in your Salesforce org. This feature allows users to log in to Salesforce using their credentials from another trusted system, streamlining the login experience and improving security. This provider is particularly useful when users already have accounts with external identity providers, and you want to integrate with their existing authentication mechanisms.

Prerequisites

Field	Description
Consumer Key	Consumer key and consumer secret are Client ID and Client Secret generated while configuring Conga API-to-API connection after onboarding your tenant.
Consumer Secret	
Authorization Endpoint URL	<p>Enter the authorization endpoint URL.</p> <p>Enter the region-specific Authorize Endpoint URL:</p> <p>For example:</p> <p>Preview Environment:</p> <p>NA: https://login-rlspreview.congacloud.com/api/v1/auth</p> <p>EU: https://login-preview.congacloud.eu/api/v1/auth</p> <p>AU: https://login-preview.congacloud.au/api/v1/auth</p> <p>Production Environment:</p> <p>NA: https://login-rls.congacloud.com/api/v1/auth</p> <p>EU: https://login.congacloud.eu/api/v1/auth</p> <p>AU: https://login.congacloud.au/api/v1/auth</p>

Field	Description
Token Endpoint URL	<p>Enter the token URL. Use any of the following URLs as per your Conga instance to access the OAuth2 token service.</p> <p>Enter the region-specific token endpoint URL:</p> <p>For example:</p> <p>Preview Environment:</p> <p>NA: https://login-rlspreview.congacloud.com/api/v1/auth/connect/token</p> <p>EU: https://login-preview.congacloud.eu/api/v1/auth/connect/token</p> <p>AU: https://login-preview.congacloud.au/api/v1/auth/connect/token</p> <p>Production Environment:</p> <p>NA: https://login-rls.congacloud.com/api/v1/auth/connect/token</p> <p>EU: https://login.congacloud.eu/api/v1/auth/connect/token</p> <p>AU: https://login.congacloud.au/api/v1/auth/connect/token</p>

To configure a new auth. provider

1. Go to **Setup** > Open the Authentication Providers page by enter **Auth. Providers** in the Quick Find box and clicking **Auth. Providers** in the results.
2. Click **New** and select Open ID Connect from the Provider Type drop-down menu.
3. Enter the admin setting name, APTS_RLPInstanceSettings which was created in the previous topic ([Creating a New Admin Setting](#)). For example, APTS_RLPInstanceSettings.
4. The URL Suffix name is generated automatically based on the Auth. providers name.
5. Enter the connected environment's consumer key and consumer secret, authorize endpoint URL, and token endpoint URL, as mentioned in the prerequisites. Leave the remaining fields as they are.
6. Click **Save**.

Next Step: [Configuring Remote Site Settings](#)

Configuring Remote Site Settings

Remote Site Settings are a security feature that controls access to external web resources from your Salesforce organization. These resources can include services, APIs, or websites that your Salesforce org needs to communicate with. By default, Salesforce blocks calls to external URLs from within its platform due to security considerations. However, you can use Remote Site Settings to explicitly allow these calls. Remote site settings help you maintain a secure environment while allowing your Salesforce organization to interact seamlessly with external web resources as needed for your business processes.

In this case, you must create the following remote site settings.

- RLPLoginURL
- RLPInstanceURL

Prerequisites

- Remote site URL for RLP login
- Remote site URL for RLP instance

Reach out to the Conga CloudOps team for the details.

To configure remote site settings

1. Go to **Setup**, enter **Remote Site Settings** in the Quick Find box, and select it.
2. Click **New Remote Site**.
3. Enter the following details:
 - a. **Remote Site Name:** Enter a remote site name. For Example, **RLPLoginURL** .
 - b. **Remote Site URL:** Enter the remote site URL. The remote site URL will be specific to the associated RLP environment. For example:
 For a preview Environment: <https://login-rlspreview.congacloud.com>
 For a production Environment: <https://login-rls.congacloud.com>
 - c. **Disable Protocol Security:** Leave this checkbox unselected.
 - d. **Description:** Enter a description.
 - e. **Active:** Select the checkbox.
4. Click **Save & New**.
5. Enter the following details:
 - a. **Remote Site Name:** Enter a remote site name. For example, **RLPInstanceURL** .
 - b. **Remote Site URL:** Enter the remote site URL. The remote site URL will be specific to the associated RLP environment. For example:
 For a preview environment: <https://preview-rls09.congacloud.com>
 For a production environment: <https://prod-rls10.congacloud.com>

- c. **Disable Protocol Security:** Leave this checkbox unselected.
 - d. **Description:** Enter a description.
 - e. **Active:** Select the checkbox.
6. Click **Save**.

Next Step: [Creating a New Static Resource](#)

Creating a New Static Resource

Static resources in Salesforce enable you to upload and reference various types of content, such as archives (.zip and .jar files), images, style sheets, JavaScript, and other files, specifically for use within your Salesforce organization. After onboarding a tenant, you must request the service team for the static resource file which you will use as a resource file to upload while creating a new static resource.

- **Create a New Custom Static Resource:** Ensure you create a new custom static resource in the target organization. The existing static resources from managed packages are outdated and do not work, which causes errors.
- **Update Mapping File with Custom Fields:** If you want to sync any custom fields from the SFDC Proposal to the Conga Platform Proposal then add that field to the static resource file and also create that field on the Conga platform.
- **Verify Fields in Conga Platform:** Ensure that the fields you add to the mapping file already exist in the Conga Platform. If not, you encounter a “metadata for field xxx not found” error.

Prerequisites

- Quote field name mapping file.
 - Click the QuoteFieldNameMap.json file. The mapping file is automatically downloaded and saved in your system.

 Do not change the file name and file type while saving this mapping file.

To Create a Static Resource in a Salesforce Org

1. Go to Setup > App Setup > Develop > Static Resources.
2. Click **New** and enter `QuoteFieldNameMap` in the Name field.
3. Click **Choose file** and upload the mapping file.
4. In the Cache Control dropdown, select one of the following values.

- a. **Private:** Select this to restrict API access to authenticated users only.
 - b. **Public:** Select this to share static resource data cached on the Salesforce server with other users in your organization.
5. Click **Save**.

The fields mentioned in the static resource file will be synced to Platform Quote during Proposal creation.

Next Step: [Creating the Configure Products Button for RLS Flow](#)

Creating the Configure Products Button for RLS Flow

Create the Configure Products button to initiate the quote-to-cash process in the RLS flow.

To create a Configure Products button

1. Go to Setup > Object Manager and search for the Quote/Proposal object.
2. Click **Quote/Proposal**. A quote details page is displayed.
3. In the left menu, click **Custom Fields & Relationships** and then click **New**. The New Custom Field page is displayed.
4. In the *Step 1. Choose the field type* page choose **Formula** as Data Type and click **Next**.
5. In the *Step 2. Choose the output type* page, enter the flow name as required. For example, `Configure Products(RLS Flow)` in the Field Label. For Formula Return Type, choose **Text**.
6. In the *Step 3. Enter the formula* page, copy the following formula and paste it under the Simple Formula tab. Click **Check Syntax** to validate the formula.

```
IF ( LEN( Apttus_QPConfig__PriceListId__c ) > 0 , HYPERLINK("/apex/
Conga_CCPQ__RLPCart?boId="&Id& "&flow=system&idp=Salesforce", IMAGE("/resource/
Apttus_QPConfig__Button_Configure", "Configure Products"), "_self"), NULL)
```

- Enter the name of your flow setting in the "flow" parameter in the above formula. In our example, it is "system".
- Update the "idp" parameter in the formula based on the org type. Use "Salesforce" for production orgs and "SalesforceSandbox" for sandbox orgs.

7. Click **Next**.
8. In the *Step 4. Establish field-level security* page, Select the profiles to which you want to grant edit access to this field via field-level security and click **Next**.

9. Choose the page layouts on which you want to display this field and click **Save**.

Next Step: [Enabling OAuth Settings](#)

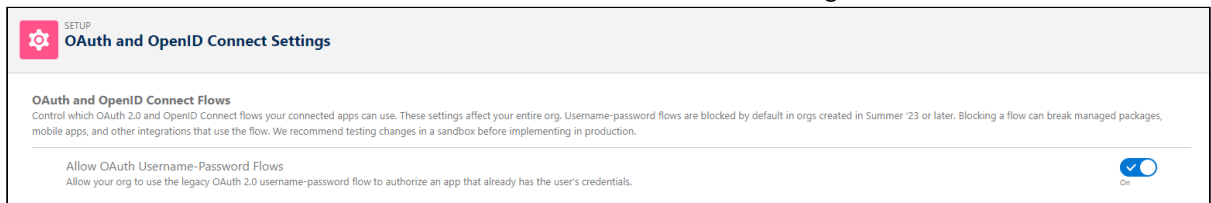
Enabling OAuth Settings

You must set up the OAuth and OpenID flows for your connected app.

If you turn on this setting, then the whole org is affected.

To enable OAuth settings

1. Navigate to Setup > Settings > Identity > OAuth and OpenID Connect Settings. A list of flows is displayed.
2. Turn on the Allow OAuth Username-Password Flows setting, if it is not enabled.



Next Step: [Creating a Connected App](#)

Creating a Connected App

You must configure a connected app in the onboarded Salesforce org to provide authentication and authorization for the Conga Platform services.

Prerequisites

Callback URL of your Salesforce org: The callback URL is your domain URL (Setup > My Domain).

To view your current domain URL:

1. Go to **Setup**.
2. Enter `my domain` in the Quick Find box and select **My Domain**.
3. Copy the URL from **My Current Domain URL**. This URL is specific to the instance you are connected to. For example, <Domain Name>.my.salesforce.com.

To create a connected app

1. Log in to the Salesforce portal as an administrator.
2. Go to **Setup**. In the Quick Find box, Enter **App Manager** and click **App Manager** in the suggestions . The Lightning Experience App Manager page appears.
3. Click **New Connected App**.
4. Fill in the following details in the **Basic Information** section.


Field	Description
Connected App Name	Enter the connect app's name, which displays in the App Manager and on its App Launcher tile. For example, RLSInstance.
API Name	The API name is generated automatically based on the name of the connected app.
Contact Email	Enter the email address of the administrator managing the connected app.

5. Fill in the following details in the **API (Enable OAuth Settings)** section.

Fields	Description
Enable OAuth Settings	Select this to define the OAuth settings. When you enable this field, additional settings are displayed under the API (Enable OAuth Settings) section.
Enable for Device Flow	Select this to enable the connected app for an external application.
Callback URL	The callback URL is your current domain URL. Refer to the prerequisites section to know your domain URL. When you select the Enable for Device Flow field, the callback URL is generated by default. Add your current domain URL to the callback URL. You can also add other URLs in separate lines.
Use Digital Signatures	Leave this option unchecked.
Selected OAuth Scope	Select Full access (full) and move to Selected OAuth Scopes by clicking the Add arrow.


Fields	Description
Require Secret for Web Server Flow	Select this to require the connected app to provide a consumer secret for authorization.
Require Secret for Refresh Token Flow	Select this option to include the connected app's client secret in the refresh token flow's authorization request. If you do not select this option and a connected app sends the client secret in the authorization request, Salesforce still validates it.
Enable Client Credentials Flow	Select this option to let this connected app use the OAuth client credentials flow.
Enable Authorization Code and Credentials Flow	Select this option to let this connected app use the authorization code and credentials flow. This flow is supported only for Experience Cloud users.

6. Leave all other fields blank. Click **Save**.

 Changes can take up to 10 minutes to take effect.

After you create a connected app, the system generates a consumer key and consumer secret to enhance the security of your connected app. The consumer key serves as a unique identifier for the customer within the Salesforce system, while the consumer secret validates the ownership and authorization associated with the consumer key.

To capture consumer key and consumer secret

1. Log in to the Salesforce portal as an administrator.
2. Go to Setup. In the Quick Find box, Enter `App Manager` and click **App Manager** in the suggestions.
3. Find the connected app, click the drop-down () icon, and then select **View**.
4. Next to Consumer Key and Secret, click **Manage Consumer Details**.
You are prompted to verify your identity using one of your registered methods.

5. In the Consumer Details section, click **Copy** next to Consumer Key and Consumer Secret and save them for future use.

Next Step: [Configuring the Conga Platform](#)

Configuring a Deep Clone Button on Proposal

You can deep-clone the existing quote using the **Deep Clone (RLS)** button on the Quote detail page. Cloning a quote copies all the information from the existing quote, including line items and proposal header information asynchronously. You can deep-clone a quote when you need multiple draft options of the same quote or need to make changes (for example, extend the quote expiry date) to a finalized quote before sending it out to the customer.

To make the deep clone button available on the quote or proposal details page, you must complete the following configurations.

- [To Create a New Global Action Button for Deep Clone](#)
- [To Add a Global Action Button on Salesforce Mobile and Lightning Experience Actions Layout](#)
- [To Add a Deep Clone \(RLS\) Button on the Quote Details Page](#)
- [To Clone an Existing Quote](#)

To Create a New Global Action Button for Deep Clone

1. Go to **Setup**. In the Quick Find box, Enter **Global Actions** and click **Global Actions** in the suggestions. A list of global actions is displayed.
2. Click **New Action** and enter the values as mentioned below.
 - a. Action Type: Custom Visualforce
 - b. Visualforce Page: BOClone [Conga_CCPQ__BOClone]
 - c. Height: 250px
 - d. Standard Label Type: None
 - e. Label: It is a free text. Enter the label name to display on the deep clone button. For example, Deep Clone (RLS).
 - f. Name: The name is generated automatically based on the label.
 - g. Description: Enter the summary about the new action button.
3. Click **Save**.

After creating a deep clone button, ensure that you have the new global action (deep clone (RLS)) available on the Salesforce mobile and lightning experience actions layout. Hence, you can view the deep clone button as an action on the proposal page.

To Add a Global Action Button on Salesforce Mobile and Lightning Experience Actions Layout

1. Go to **Setup**. In the Quick Find box, Enter **Publisher Layouts** and click **Publisher Layouts** in the suggestions. A Publisher Layouts page is displayed.
2. In the global layout section, click **Mobile & Lightning Actions**.
3. Drag and drop the new global action (Deep Clone (RLS)) to the Salesforce mobile and lightning experience actions layout.
4. In the global layout section, click **Save**.

The new global action button is now available on the lightning actions layout and you must add a deep clone (RLS) button on the quote details page.

To Add a Deep Clone (RLS) Button on the Quote Details Page

1. Go to **Setup** > Object Manager.
2. Click **Quote/Proposal**. A quote/proposal object details page is displayed.
3. In the left pane, click **Page Layouts**. A list of page layouts is displayed.
4. Click **Proposal Layout**.
5. In the Proposal Layout section, click **Mobile & Lightning Actions**.
6. Drag and drop the Deep Clone (RLS) to the Salesforce mobile and lightning experience actions layout.
7. In the global layout section, click **Save**.

To Clone an Existing Quote

1. Navigate to your existing quote.
2. Click the **Deep Clone (RLS)** button. A new quote is generated with a unique quote number whose **Status** is *Draft*, and **Configurations** status is *Saved*.

Configuring View Cart (Read Only) Button on Proposal

This feature allows you to open your Product Configuration in read-only mode. In read-only mode you are only able to see the line items in the cart, you cannot edit any fields. All the action buttons are disabled in a read-only cart. To open the read-only cart, you can use a separate **Configure Product** button with read-only access on the Quote Details page that your admin must configure. When you open a cart in read-only mode, no new product configuration is created on the Quote Details page.

You can perform the following tasks in a read-only cart:

- Search for products on the cart.
- Open or create new Cart Views.
- Use advanced filters.
- Save Cart Views with the filters.
- Close the cart

You can open a cart in read-only mode even when the pricing of the line item is pending. When you open such a cart, the priced line items are displayed and a progress bar is displayed with the status of the ongoing pricing process of the remaining line items. The action buttons remain disabled until you exit the read-only mode.

To Configure the View Cart (Read Only) Button on the Proposal Details Page

1. Go to **Setup** > Object Manager.
2. Click **Quote/Proposal**. A quote/proposal object details page is displayed.
3. In the left pane, click **Fields & Relationships**. A list of fields and relationships is displayed.
4. Click **New**.
5. In the *Step 1. Choose the field type* page choose **Formula** as Data Type and click **Next**.
6. In the *Step 2. Choose the output type* page, enter the flow name as required. For example, View Cart Read Only (Platform) in the Field Label. For Formula Return Type, choose **Text**. Click **Next**.
7. In the *Step 3. Enter the formula* page, copy the following formula and paste it under the Simple Formula tab. Click **Check Syntax** to validate the formula.

```
IF ( LEN( Apttus_QPConfig__PriceListId__c ) > 0 , HYPERLINK("/apex/
Conga_CCPQ__RLPCart?boid=""&Id=""&mode=readOnly&flow=system" , IMAGE("/resource/
APTS_ViewCart", "View Cart"), "_self"), NULL)
```

8. Click **Next**.
9. In the *Step 4. Establish field-level security* page, select the profiles to which you want to grant edit access to this field via field-level security, and click **Next**.
10. Choose the page layouts on which you want to display this field and click **Save**.

Configuring My Approval Button on Proposal Detail Page

RLS approval is an aura component with a lightning button named "My Approvals" that directs you to the My Approvals page. Using Lightning App Builder, you can add this component to any object's record detail pages.

Prerequisites:

1. Basic Knowledge of using Salesforce Developer Console. For more information, see Using the Developer Console.
2. Update the APTS_RLPInstanceSettings admin setting with the approvals endpoint URL, `https://<connected_environment>/approvals/`. The endpoint URL is specific to the environment you are connected to.
For the QA environment: `https://rls-qa.congacloud.io/approvals/`.
3. Create an apex class, such as `RLSApprovalsHandler.cls`. All required profiles should be granted access to this new class.
4. Create an aura component, such as `RLSApprovals.cmp`
5. Include the component on the detail page of the record.

To create an apex class:

1. Log in to Salesforce > click the setup (⚙️) icon > Developer Console. A developer console page is displayed.
2. Click File > New > Apex Class.
3. Enter the name of the Apex class as `RLSApprovalsHandler` and enter the following code.

RLSApprovalsHandler.apxc

```
public with sharing class RLSApprovalsHandler {
    @AuraEnabled
    Public static String getSessionID(){
        return UserInfo.getSessionId();
    }
}
```

4. Click File > Save.

To create an aura component

1. Log in to Salesforce > click the setup (⚙️) icon > Developer Console. A developer console page is displayed.
2. Click File > New > Lightning Component.
3. Enter the Name as *RLSApprovals*.
4. Add required configurations to the new component available under the component configuration.
5. Click Submit and enter the following code.

RLSApprovals.cmp

```
<aura:component controller="RLSApprovalsHandler" implements="force:appHostable,
flexipage:availableForAllPageTypes,flexipage:availableForRecordHome,force:hasRe
cordId,force:lightningQuickAction,force:hasSObjectName" access="global" >
  <aura:attribute name="sObjectName" type="String" />
  <aura:attribute name="recordId" type="String" />

  <div style="border: 1px solid lightgray; padding: 5px; margin-bottom: 10px;
border-radius: 5px;background-color:white">
    <div style="margin-left: 7px; margin-bottom: 7px; color: black; font-
weight: 700; font-size: 16px;">
      <span>
        RLS Approvals
      </span>
    </div>
    <div class="full forcePageBlockSectionRow">
      <p class="full forcePageBlockItem forcePageBlockItemView" style="wi
dth:100%;text-align:center">
        <div class="slds">
          <div class="slds-grid slds-wrap">
            <div class="slds-col slds-size_1-of-12 ">
              <a aura:id="myapproval" onclick="{!
c.callMyApprovals}" class="HideLine">
                <lightning:icon iconName="standard:approval"
size="medium" alternativeText="Approvals"/>
                <br/>
                <span class="osOutputLabel">My <br/>Approvals</
span>
              </a>
            </div>
          </div>
        </div>
      </p>
    </div>
  </div>
```

```

        </div>
    </p>
</div>
</div>
</aura:component>

```

6. Click File > Save.
7. The RLSApprovals component details are displayed in the right pane.
8. Click CONTROLLER. An RLSApprovalsController tab is displayed. Enter the following code.

RLSApprovalsController.js

```

({
  callMyApprovals : function(component, event, helper) {
    helper.callMyApprovals(component);
  }
})

```

9. Click File > Save.
10. From the RLSApprovals right pane, click HELPER.

RLSApprovalsHelper.js

```

({
  callMyApprovals : function(component, event, helper) {
    var recordId = component.get("v.recordId");
    var sObjectName = component.get("v.sObjectName");
    // the below URL needs to be changed according to the environment of
    testing. eg: rlsstg, rlsqa..
    var redirectUrl = "https://rls-dev.congacloud.io/approvals/my-
    approvals";
    var coreApps= component.get("c.getSessionID");
    coreApps.setCallback(this, function(response) {
      var state = response.getState();
      if (state === "SUCCESS") {
        var params = {};
        var sessionId = response.getReturnValue();
        params.sessionId = sessionId;
        params.recordId = recordId;
        params.sObjectName = sObjectName;
        params.url = redirectUrl;
      }
    });
  }
})

```



```

        this.navigate(component, event, helper, params);
    }
});
$A.enqueueAction(coreApps);
},
navigate : function(component, event, helper, params) {
    var urlEvent = $A.get("e.force:navigateToURL");
    urlEvent.setParams({
        "url": params.url+'?recordId='+params.recordId+'&sObjectName='+para
ms.sObjectName+'&sessionId='+params.sessionId
    });
    urlEvent.fire();
}
})

```

11. Click File > Save.

To include an RLS Approval component on a Salesforce object:

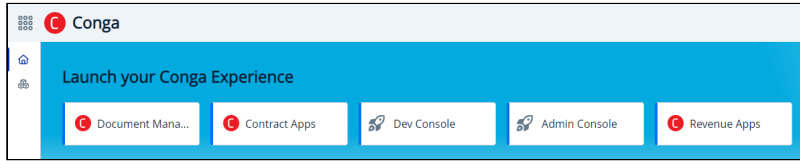
1. Log in to Salesforce > Go to Setup > Object Manager.
2. Click **Quote/Proposal**. A quote/proposal object details page is displayed.
3. From the left pane, click Lightning Record Pages. A quote proposal record page is displayed.
4. Click **Edit**.
5. From the left pane, drag and drop RLSApprovals (available under the *Custom* list) to the right pane.

Configuring the Conga Platform

After configuring your Salesforce org, you must configure Conga Platform.

To launch Conga Platform

1. Click the Login URL (Go to URL) in the welcome email.
2. Enter the username and password.
3. Click **Sign-in**. A Launch your Conga Experience Page is displayed.



4. Click **Admin Console**. A Platform Administration page is displayed.

ⓘ Start with the [Adding a New User](#) topic and follow the steps for the successful setup.

- [Managing External Integrations and Conga API Connections](#)
- [Adding a New User](#)
- [Configuring DataSync Infrastructure](#)
- [Running DataSync](#)

Managing External Integrations and Conga API Connections

The External Integration tab allows administrators to view and manage users authorized through external organizations. You can add one or more external integrations; however, you can make only one as a default IDP.


To add a new external integration

1. Log in to the Conga Platform as an admin user. A Conga Platform welcome page is displayed.
2. Click the **Admin Console** tile. A Platform Administration page is displayed.
3. Click **Organization**.
4. Open the External Integrations tab and click **Add New**, raising the Add New External Integration screen.
5. Choose **Identity Provider** (Salesforce or Salesforce Sandbox) from the drop-down list and click **Authorize**, to open the selected IDP's login screen.
6. Log in with your onboarded Salesforce org credentials.
If you get any access-related prompts during this process, please allow full access. When you log in, the selected identity provider's external identifier auto-populates the External ID field.
7. Enter the type of this integration in the **Type** text field. It is a free-form text field. You can add types such as Dev, QA, UAT, Prod, etc.

8. Add the description.
9. Enable the **Default IDP** toggle to make it a Default External Integration IDP.
10. Click **Save**.

To configure an API to API connection


You must establish an API-to-API connection between your Salesforce org and Conga Platform. This connection ensures seamless communication and data exchange between your Salesforce org and Conga Platform.


1. Login to the Conga Platform as an Admin User.
2. Click the App Launcher () icon from the top-left corner > **Admin Console** > **Organization**.
3. Go to the Conga API Connections tab.
4. Open the **Conga API Connections** tab and click **Add API-to-API Connection**.
5. Enter values in the following fields:

Field	Description
External Integration	Select the respective External Integration for which you want to configure the connection.
Client Name	Enter the client's name.
Description	Enter the appropriate description.

6. Click **Save & Generate Client Secret** to generate the Client ID.
7. Click **Copy** next to **Client ID and Client Secret**.
8. Save them for future use.

To configure UI to API connection

1. Login to the Conga Platform as an Admin User.
2. Click the App Launcher () icon from the top-left corner > **Admin Console** > **Organization**.
3. Go to the Conga API Connections tab.
4. Click **Add UI To API Connection**.
5. Enter values in the following fields:

Field	Description
External Identifier	Select your Salesforce org ID for which you want to configure the connection. The external identifier list is populated based on the External Integration that you added. For more information, see External Integrations.
Client Name	Enter the client name.
Description	Enter the appropriate description.
Redirect URI	<p>Enter the UI Callback Endpoint (URI of the RLPCart page). It is the site to which identification and access tokens are sent.</p> <ul style="list-style-type: none"> • <code>https://<your Salesforce org domain>--conga-ccpq.vf.force.com/apex/RLPCart</code> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> You can also include comma-separated fully qualified multiple URLs if required.</p> </div>
Cors Origins	<p>Enter the Domain Name present in the callback endpoint. It is the base URL of the origin server to enable cross site request.</p> <p>For example:</p> <ul style="list-style-type: none"> • <code>https://<your Salesforce org domain>.my.salesforce.com</code>

6. Leave other fields blank.
7. Click **Save & Generation Client ID** to generate the Client ID.
8. Copy the **Client ID**. Use this client Id as a SPAClientId while creating a new admin setting as part of Salesforce configurations.

The UI to API connection is configured and activated. You can Deactivate or Reactivate any of the Conga API Connections by using the respective hyperlink under the Actions column, and Edit the configuration by clicking the External Identifier hyperlink on the list page.


Next Step: [Adding a New User](#)


Adding a New User




You can manage Conga Platform users using the User Administration user interface. The Users tab allows you to:

- Create, update, and manage users.
- Import user information.
- Assign roles to users.
- Set default options for users. For example, locale, time zone, date and time format, and other preferences.

To create a new user


1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner, then go to **Admin Console > Users**.
A list of users is displayed.
3. Click **Add** to add a new external user. The User Details screen appears.
4. Enter values in the following fields:

Field Name	Description
User Type	Select an external user from the dropdown list.
ExternalId	<p>Enter the user's external ID. This can be any unique alphanumeric text used to identify the user. This ID is used when migrating users from one environment to another. You can enter up to 2000 characters in this field.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p> • For the Salesforce identity provider user, the user's unique Salesforce ID (18 digits) must be added as an external ID. For more information on how to get the 18-digit user ID, see Getting Salesforce User ID.</p> <p>• ExternalId is optional for Conga IDP users.</p> </div>
User Name	Enter the user's unique user name. The Conga IDP user uses this username to log onto the Conga Platform. You can enter up to 255 characters in this field.

Field Name	Description
First Name	Enter the user's first name. You can enter up to 255 characters in this field.
Last Name	Enter the user's last name. You can enter up to 255 characters in this field.
Email	Enter the user's email address. It must be a valid email address in the form: test@abc.com, test@abc.in, etc. You can enter up to 255 characters in this field.
Role	Enter the keyword to search and select the appropriate role to be assigned to a new user. A role is assigned to users performing similar tasks and consists of a set of permissions. For more information, see Managing Roles and Permission Groups .
Permission Groups	Select permission group(s) from the list. Permission groups are assigned to users for additional access that is not part of the selected role. Permission groups determine a given user's access to objects and records, and permissions to perform actions in the Conga Revenue Lifecycle Platform.
Timezone	<p>Enter the keyword to search and select the time zone from the list.</p> <div data-bbox="352 1223 1426 1350" style="border: 1px solid #ccc; padding: 5px;"> <p> If you do not provide a time zone, the application uses the organization's time zone and assigns it to the user.</p> </div>
Locale	<p>Enter the keyword to search and select the locale from the list.</p> <div data-bbox="352 1447 1426 1574" style="border: 1px solid #ccc; padding: 5px;"> <p> If you do not provide a locale, the application uses the organization's locale and assigns it to the user.</p> </div>
Currency	<p>Enter the keyword to search and select the currency from the list.</p> <div data-bbox="352 1671 1426 1798" style="border: 1px solid #ccc; padding: 5px;"> <p> If you do not provide a currency, the application uses the organization's currency and assigns it to the user.</p> </div>
Alias	Enter the user's alias name. You can enter up to 255 characters in this field.

Field Name	Description
Language	Enter the user's language. For example, <code>en-IN</code> . You can enter up to 255 characters in this field.
Address	Enter the user's full address. You can enter up to 64000 characters in this field.
Phone Number	Enter the user's phone number. You can enter up to 255 characters in this field.

5. Click **Save**.



 The Conga IDP user receives a Welcome email that includes the username, the first-time login password, and organization information. The user can generate a new password using the default first-time login password.

Newly created users are in an active state by default. Based on the Timezone, Locale, and Currency selections, the Positive Currency Format, Negative Currency Format, Short Date Format, Log Date Format, Time Format, Decimal Symbol, Digit Group, Digit Grouping Symbol, and Negative Number Format information will be added to the new user. All of these fields can be changed while editing the user.

Activating or Deactivating Users

An administrator can activate or deactivate existing users from the user details page. Users can be granted role-based activation and deactivation access. A deactivated user cannot log in to the Conga Platform Administration portal.

To activate or deactivate a user

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner and go to **Admin Console > Users**.
A list of users is displayed.
3. Click the More () icon next to the user name and select **Activate** or **Deactivate**.

Next Step: [Configuring DataSync Infrastructure](#)


Configuring DataSync Infrastructure

After completing the external integration (Salesforce or Salesforce Sandbox) and adding admin users, the next step is to synchronize data from the source system to the Conga Platform. Before synchronizing, you must connect the source and target systems. This section describes the required configurations.

To configure data sync infrastructure

1. Log in to the Conga Platform as an admin user. A Conga Platform welcome page is displayed.
2. Click the **Admin Console** tile. A platform administration page is displayed.
3. Click **DataSync**.
4. Click the More (⋮) icon on the Data Sync UI, and then click **Settings**. The Settings page is displayed. By default, the Salesforce Settings tab is selected.
5. In the Salesforce Settings tab, enter the values in the following fields:

Field	Description
Username	Enter your Salesforce account username.
Password	Enter your Salesforce account password. When you enter the password, dots replace the characters for security reasons. To see or hide the characters, click the eye icon.
Token URL	Enter the token URL. You may use either a Preview or production instance URL to access the OAuth2 token service. <ul style="list-style-type: none"> • Preview URL: https://test.salesforce.com/services/oauth2/token • Production URL: https://login.salesforce.com/services/oauth2/token

Field	Description
Secret	<p>Enter the security token in this field. When you enter the security token, dots replace the characters for security reasons. To see or hide the characters, click the eye icon.</p> <p>To get the secret, reset the security token associated with the Salesforce account. After the security token is reset, the new security token is sent to the email address specified in the Salesforce personal settings. For step-by-step instructions, see Reset Your Security Token.</p> <p>If you are unable to see the option to reset your security token, see Troubleshooting.</p>
Client ID	Enter the consumer key generated after creating the connected app.
Client Secret	<p>Enter the consumer secret generated after creating the connected app. When you enter the client secret, dots replace the characters for security reasons. To see or hide the characters, click the eye icon.</p> <p>For more information on creating a connected app and getting the client ID and secret, see Create a Connected App.</p>
Domain URL	<p>Enter the domain URL for the Salesforce portal. We recommend using the classic URL format that ends with ".salesforce.com."</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p> The system does not currently support URLs in Lightning Mode format, which end with ".lightning.force.com".</p> </div> <p>For example, use <code>https://<domainname>.develop.my.salesforce.com/</code> URL instead of <code>https://<domainname>.lightning.force.com/</code> URL.</p>
Salesforce API Version	It is advisable to mention the latest API version. For more details on getting the API version information, see Find Salesforce Edition and API version .

6. Click **Save**.
7. Click the Platform Settings tab.
8. Enter the values in the following fields:

Field	Description
Client ID	Enter the client ID and client secret generated after creating the API-to-API connection.
Client Secret	When you enter the client secret, dots replace the characters for security reasons. To see or hide the characters, click the eye icon. For more information on creating the API-to-API connection and getting the client ID and secret, see To Configure API to API Connection .
Token URL	Enter the region-specific Conga Platform token URL. For example: Preview Environment: NA: https://login-rlspreview.congacloud.com/api/v1/auth/connect/token EU: https://login-preview.congacloud.eu/api/v1/auth/connect/token AU: https://login-preview.congacloud.au/api/v1/auth/connect/token Production Environment: NA: https://login-rls.congacloud.com/api/v1/auth/connect/token EU: https://login.congacloud.eu/api/v1/auth/connect/token AU: https://login.congacloud.au/api/v1/auth/connect/token

9. Click **Save**.
10. Click the **Custom Settings** tab. A list of Flows and Settings are displayed.
11. Click all CPQ-related flows and settings.


Next Step: [Running DataSync](#)

Running DataSync


After you onboard your tenant, all the CPQ and CRM OOB objects in Salesforce are automatically mapped to the Conga Platform. Once the configurations on both Salesforce and Conga Platform are completed, sync the master data objects like Products, Categories, Pricelists, Accounts, Opportunities etc to the RLP object database using the Data Sync tool.


To run data sync manually

1. Log in to the Conga Platform as an admin user. A Conga Platform welcome page is displayed.
2. Click the **Admin Console** tile. A platform Administration page is displayed.
3. Click **DataSync**. The Mapped Objects for Data Sync page appears.


 Conga recommends enabling one master object at a time and then performing a data sync.

4. Click **Sync Now**. The Sync Now window appears.

Field	Description
Sync Type	<p>Select the synchronization method that suits your needs:</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <p> Select Full if you are running data sync for the first time for the selected objects.</p> </div> <ul style="list-style-type: none"> • Full: Resyncs all records, including previously synced ones. • Incremental: Syncs only new records or those not on the Conga Platform yet.
Sync Attribute Data	<p>Enable this toggle to sync attribute data (which may include fields, metadata, or additional information) associated with the object.</p>

 The system displays a validation alert if the entered [Salesforce and Platform Settings](#) information is invalid.

5. Click **OK**. The data sync process begins, and you are redirected to the Run History tab.
6. Click **Run History** to view sync details and any associated errors.

 To perform a datasync for order line items in bulk, ensure that the feature flag *platform-enable-datachange-stream-notifications* is enabled for your org. If not, reach out to the Conga support team to enable the flag for your org.

Use Case: Running DataSync for the Product Object

1. Log in to the Conga Platform as an admin user. A Conga Platform welcome page is displayed.
2. Click the **Admin Console** tile. A platform administration page is displayed.
3. Click **DataSync**. The Mapped Objects for Data Sync page appears.
4. On the Data Sync user interface, click the More (⋮) icon > click **Disable All**. A confirmation pop-up is displayed. Click **Yes**.
5. Turn on the **Is Enabled?** option next to the Product object.
6. Click **Sync Now**. The Sync Now window appears.

Field	Description
Sync Type	<p>Select the synchronization method that suits your needs:</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>i Select Full if you are running data sync for the first time on the product object. Otherwise, select Incremental.</p> </div> <ul style="list-style-type: none"> • Full: Resyncs all records, including previously synced ones. • Incremental: Syncs only new records or those not on the Conga Platform yet.
Sync Attribute Data	<p>Enable this toggle to sync attribute data (which may include fields, metadata, or additional information) associated with the object.</p>

i The system displays a validation alert if the entered [Salesforce and Platform Settings](#) information is invalid.

7. Click **OK**. The data sync process begins and you are redirected to the Run History tab, where you can view sync details and any associated errors.
8. You can verify the sync status by clicking on the pipeline ID in the run history tab. If the data sync fails, click the **Errors** button to download the error report.
9. Follow the same procedure for other required master objects.

A successful data sync for all master objects indicates your Salesforce organization is connected to the Conga Platform.

Next Step: [Configuring Revenue Admin Settings](#)

Configuring Revenue Admin Settings


After running the data sync on all CPQ and CRM master objects, perform the following configurations on the CPQ on Conga Platform to load appropriate pages for various sections, such as Catalog, Configuration, Cart, and Asset.

The following are the minimum required configurations to create quotes using Conga RLS. You can also make additional configurations to the following settings based on your business requirements.

- [Configuring Revenue Admin Application Settings](#)
- [Configuring Flow Settings](#)

Configuring Revenue Admin Application Settings

Configuring General Settings


1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner and go to Revenue Apps. A Proposals page is displayed.
3. In the left navigation pane, click the Revenue Admin Icon.
4. Under ADMIN SETUP, go to Application Settings > Global Settings > General.
5. Enter the following details.

Setting	Description
System Global	
Keep Abandoned Carts	Turn this setting ON to indicate whether abandoned carts must be kept.
Bypass Shopping Cart	Turn this setting ON to bypass the shopping cart. CPQ displays the Update Price and Finalize buttons and hides the Go To Pricing button on the configuration page.
Field Precision	

Setting	Description
Percentage Field Precision	Enter a number to specify decimal places for percentage precision. For example, number 5.
Currency Field Precision	Enter a number to specify decimal places for currency precision. For example, number 5.
Quantity Field Precision	Enter a number to specify decimal places for quantity precision. For example, number 5.
Term Field Precision	Enter a number to specify decimal places for selling term precision. For example, number 5.
Finalization and Approvals	
Auto Finalize On Cart Approval	Turn this setting ON. This indicates whether the cart is auto-finalized. CPQ automatically finalizes the cart when approved and ready for finalization.
Auto Sync On Cart Approval	Turn this setting ON. This indicates whether the cart is auto-synchronized. CPQ automatically synchronizes the cart when approved and ready for finalization.

6. Click **Save**.


Configuring Catalog Settings

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner and go to Revenue Apps. A Proposals page is displayed.
3. In the left navigation pane, click the Revenue Admin icon.
4. Under ADMIN SETUP, go to Application Settings > Global Settings > Catalog.
5. Enter the following details and click **Save**.

Setting	Description
Display Settings	


Setting	Description
Enable Location	Turn this setting ON. This enables users to select a location for a cart. Line items will have the current cart location assigned to them.
Disable Add Another	Turn this setting OFF. Turning this setting on prevents the user from adding multiple instances of the same product.
Hide Configure Action	Turn this setting OFF. Turning this setting on hides the Configure action for a product on the catalog page.
Listed Products Column 2	Select Product Description from the dropdown.
Listed Products Column 3	Select Product Family from the dropdown.
Hide Single Top Category	Turn this setting ON. This hides the top category. This is useful only when you have a single root category and want a cleaner look for its child categories, without the root category.
Enable Category Filter	Turn this setting ON. This enables Narrow Your Search category filtering during product search. It filters the categories based on search results and displays them in the Narrow Your Search area. For example, if the search result has products from only two categories, the Narrow Your Search section displays only those two categories.
Hide Product Image	Turn this setting OFF. Turning this setting on hides the product image from the catalog page.

Configuring Config Settings

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner and go to Revenue Apps. A Proposals page is displayed.
3. In the left navigation pane, click the Revenue Admin Icon.
4. Under ADMIN SETUP, go to Application Settings > Global Settings > Config.
5. Enter the following details and click **Save**.

Setting	Description
Display Settings	
Hide Price Column	Turn this setting ON to disable the price column from the options page. By default, this setting is turned off.
Listed Options Column 2	Enter the API name of the product field to be displayed in the Listed Options section.
Listed Options Column 3	Enter the API name of the product field to be displayed in the Listed Option section.
Show Option Quantity	Turn this setting ON to display the quantity in the body of the options pages.
Disable Add To Cart for Option Products	Turn this setting ON to hide the Add To Cart and Configure buttons for an option product on the catalog page. This is helpful to prevent your sales representative from selling an option product without its bundle product.
Show Tab View	Turn this setting ON to display option groups in a tab view instead of sections on the options page.
Bundle Description Field	Enter the field names from the product object to be displayed as bundle description.
Enable Option Page Search	Turn this setting ON to allow option search on the bundle configuration page.
Collapse All Leaf Option Groups	Turn this setting ON. This option defines whether the child option groups inside a bundle are expanded or collapsed by default.
Miscellaneous	
Enable Field Expressions	Turn this setting ON to enable field expressions.

Configuring Cart Settings

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner and go to **Revenue Apps**. A Proposals page is displayed.
3. In the left navigation pane, click the Revenue Admin Icon.
4. Under ADMIN SETUP, go to Application Settings > Global Settings > Cart.
5. Enter the following details and click **Save**.

Settings	Description
Display Settings	
Enable Auto Sequencing For Options	Turn this setting ON to enable auto-sequencing for options. If you do not turn this setting on, the sequencing of option line items on the cart will be based on the user selection sequence rather than the bundle options sequence.
Show Recommended Products Cart View	Turn this setting ON to display the recommended products component in the Cart Detail View page.
Product Display Max Length	Enter the maximum number of characters to be displayed for the product name on the cart page. If the product name exceeds the maximum length, CPQ displays an ellipsis or wraps the product name. The default value is 21.
Show Attributes In Cart	Turn this setting ON to display the specified attributes applicable to the line items in the cart. Attributes appear in the product dialog.
Expand Bundles In Cart	Turn this setting ON to expand all attributes and options of a bundle product in the cart.
Hide Copy Action	Turn this setting ON to hide the copy action in the cart view.
Group By Fields	Enter the API names of those line item fields that are of the type: Lookup, Formula Fields, and Text. These line item fields are displayed under the Group By drop-down on the cart page.
Hide Grand Total	Turn this setting ON to hide the grand total line on the cart page.

Settings	Description
Hide Subtotals In Cart	Turn this setting ON to hide subtotals in the cart view.
View Cart Total Custom Fields	Enter the list of custom fields from the summary group object to be displayed in the custom view cart page. Each field API name must be separated by a comma or a new line.
Disable Cart Activity History	Turn this setting ON to disable the generation of activity history in product configuration. If you turn this setting on, CPQ does not add entries to the Activity History-related list when you create, finalize, or reconfigure a product configuration.
Disable Cart Async Notification	Turn this setting ON to disable the email notifications you receive after completion of any async operation such as cart finalization and pricing in every type of quote or agreement.
Enable Contextual Totals	Turn this setting ON to display the subtotals and totals section at the bottom of the cart page.
Grid Render Threshold	Enter the number of rows to load when the cart grid renders. This setting improves the grid scroll performance, with a default value of 20. You must adjust the value based on the number of lines displayed on the cart.
Hide Cart Views	Turn this setting ON to hide cart views on the cart.
Hide Cart Views Creation	Turn this setting ON to hide cart view creation.
Column Render Threshold	Enter the number of columns to load when the cart grid renders. This setting improves to improve the grid horizontal scroll performance, with a default value of 10. Must be adjusted to a higher value based on the number of columns displayed in a cart.
Enable Paginated Grid	Turn this setting ON to enable pagination for the cart grid.
Field Set Settings	
Line Item Fields to Revalidate Invalid Price List Items	Select the line item fields to be used to revalidate invalid price list items. This field set controls a list of display fields in the revalidation pop-up for price list item changes.


Settings	Description
Line Item Fields to Revalidate Product Structures	Select the line item fields to be used to revalidate product structures. This field set controls the list of display fields in the revalidation pop-up for product structure changes.
Advanced Settings	
Enable Optional Items	Turn this setting ON to enable optional items in the cart.
Max Allowed Lines For Mass Actions	Enter the maximum number of line items (supported by the product) to be allowed for performing mass actions on the cart page.
Run Validation Callback On Add	Turn this setting ON to invoke the Validation Callback when adding a product.
Save On All Actions	Turn this setting ON to save the configuration when you perform any action on the cart page.
Mini Cart Settings	
Hide Selected Products Column1	Turn this setting ON to hide the column that displays the product name.
Selected Products Column2	Enter the API name of the line item field to be displayed in the selected products section. Example value: ProductId__r.ProductCode
Selected Products Column3	Enter the API name of the line item field to be displayed in the selected products section. Example value: ProductId__r.ProductCode
Selected Products Column4	Enter the API name of the line item field to be displayed in the selected products section. Example value: ProductId__r.ProductCode

Next Step: [Flow Settings](#)

Configuring Flow Settings

When you launch the flow settings, the Flow Settings page is displayed. All the existing flows are listed on this page with their details. There are various functionalities available for you to manage the flows.

Navigating the flow settings


1. Log in to the Conga Platform as a revenue admin user.
2. Click the App Launcher () icon from the top-left corner and go to Revenue Apps. A Products page is displayed.
3. Go to ADMIN SETUP > Application Settings > Flow Settings. A list of flows is displayed.

 Start with the [Cart Page Settings](#) topic and follow the steps.


- [Cart Page Settings](#)
- [Catalog Page Settings](#)



Cart Page Settings

You can configure system flows to make specific actions available on the cart page.

 The following are the minimum required settings (display actions, column settings, etc.) that you must configure to make them available on the cart page.

To configure the flow settings

1. Log in to the Conga Platform as a revenue admin user.
2. Click the App Launcher () icon from the top-left corner and go to Revenue Apps. A Products page is displayed.
3. Go to ADMIN SETUP > Application Settings > Flow Settings. A list of flows is displayed.
4. Click **System**. A Flow Settings page is displayed. By default, a Cart Page is selected.
5. In the Action Settings tab, enter the following minimum settings required to load the cart page.

 • Click **Add New** or the add icon () to add an action (custom button).

- Click the delete icon (🗑️) to delete an action. The delete icon is visible only for custom actions added by you.
- Drag the display actions using the icon ⋮ next to a display type to rearrange the cart action sequence for the cart page.

Action	Action Label Name	Display As	Action Area	Is Enabled	Always Display
GenerateDocument	GenerateDocument	Action	Center	Yes	Yes
EditPriceAgreement	EditPriceAgreement	Action	Center	Yes	Yes
Finalize	Finalize	Action	Center	Yes	Yes
Abandon	Abandon	Action	Center	Yes	Yes
Save	Save	Action	Center	Yes	Yes
QuickSave	QuickSave	Action	Center	Yes	Yes

6. Click **Save**.
7. Click the Column Settings tab. The following column settings are displayed.
 - Cart Line Item
 - Total Columns
 - Price Ramp
 - Usage Price Tier
 - Tiered Price
 - Related Price
 - Adjustment Line Item
 - Mass Update
 - Agreement Price Rule
8. In the Cart Line Item settings, enter the following and click **Save**.

Field Name	Style	Style Class	Is Editable
BasePrice	text-align:right	aptCurrency	Yes
Quantity	text-align:right	aptQuantity	Yes

Field Name	Style	Style Class	Is Editable
SellingTerm	text-align:right; width:60px;	aptQuantity	Yes
NetPrice	text-align:right	aptCurrency	Yes
StartDate	text-align:right	Leave blank	Yes
EndDate	text-align:right	Leave blank	Yes
ExtendedPrice	text-align:right	aptCurrency	Yes

9. In the Total Columns settings, enter the following and click **Save**.

Field Name	Style Class	Is Editable
AdjustmentType	aptAdjustmentType	Yes
AdjustmentAmount	aptAdjustmentAmount	Yes

10. In the Price Ramp, enter the following and click **Save**.

Field Name	Is Editable
Quantity	Yes
Selling Term	Yes
SellingFrequency	Yes
ExtendedPrice	Yes
AdjustmentTyoe	Yes
AdjustmentAmount	Yes
StartDate	Yes
EndDate	Yes

11. In the Usage Price Tier, enter the following and click **Save**.

Field Name	Is Editable
TierStartValue	Yes
TierEndValue	Yes
UsageRate	Yes
FlatPrice	Yes
IsIncluded	Yes

12. In the Tiered Price, enter the following and click **Save**.

Field Name	Is Editable
Sequence	Yes
TierStartValue	Yes
TierEndValue	Yes

13. In the Related Price, enter the following and click **Save**.

Field Name	Is Editable
Related ChargeType	Yes

14. In the Adjustment Line Item settings, enter the following and click **Save**.

Field Name	Is Editable
Type	Yes
AdjustmentAppliesTo	Yes
AdjustmentType	Yes
AdjustmentAmount	Yes
BenefitQuantity	Yes
RunningTotalAdjustedPrice	Yes

15. In the Mass Update settings, enter the following and click **Save**.

Field Name	Is Editable
Quantity	Yes
AdjustmentType	Yes
AdjustmentAmount	Yes
StartDate	Yes
EndDate	Yes

16. In the Agreement Price Rule settings, enter the following and click **Save**.


Field Name	Is Editable
Sequence	Yes

Next Step: [Catalog Page Settings](#)

Catalog Page Settings

You can configure action settings for flows to be available on the catalog page.

To configure catalog page settings

1. Log in to the Conga Platform as a revenue admin user.
2. Click the App Launcher () icon in the top-left corner and go to Revenue Apps. A Products page is displayed.
3. Go to ADMIN SETUP > Application Settings > Flow Settings. A list of flows is displayed.
4. Click **System**. A Flow Settings page is displayed.
5. Click **Catalog Page**.
6. Enter the following in the Action Settings page. These are the minimum settings required to load the catalog page.

Action	Action Label Name	Display As	Action Area	Is Enabled	Always Display
InstalledProducts	InstalledProducts	Action	Right	Yes	Yes
CompareProducts	CompareProducts	Action	Center	Yes	Yes
GoToPricing	GoToPricing	Action	Center	Yes	Yes
UpdatePrice	UpdatePrice	Action	Center	Yes	Yes
Finalize	Finalize	Action	Center	Yes	Yes
CloseCart	CloseCart	Action	Center	Yes	Yes
Abandon	Abandon	Action	Center	Yes	Yes
Save	Save	Action	Center	Yes	Yes
QuickSave	QuickSave	Action	Right	Yes	Yes

7. Click **Save**.

Now, you can test the quote creation process in the Revenue lifecycle solution (RLS) flow.

Next Step: [Creating a Quote from the Proposal](#)

Creating a Quote from the Proposal

After configuring the required settings on the Conga Platform, you can test and verify the quote creation flow using the RLS flow. To achieve this, you must log in to the onboarded Salesforce org to create a new quote or proposal.



Prerequisites

- You have associated the products with the price list you are using for a new quote. For more information, see [Associating Price Lists with a Product](#).
- All required products associated with the price list you are using for new quotes are activated and published. For more information, see [Configuring the Products](#).
- The account you are using for a new quote has been synced with the Conga Platform.

- Document generation is configured for a quote in the Salesforce org. For more information, see [Configuring Document Generation for Quote](#).

You can use the Conga CPQ on the Salesforce interface to enter the necessary information and prepare a quote/proposal request or draft. To complete the quote/proposal, you must enter details relevant to the proposal. Some of the fields, identified with either a red vertical line or asterisks, are required to save the proposal record. If the required details are not entered or incorrect details are entered, the system displays validation rule errors at the top of the page, highlighted in red.

To create a quote or proposal

1. Log in to Salesforce.
2. Click the App Launcher () icon from the top-left corner and enter **Conga CPQ**, and select **Conga CPQ**.
3. Go to the Proposals tab and click **New**.
4. Enter the proposal and opportunity names in the **Propoosal Name** and **Opportunity** fields.
5. Enter an account and price list information in the **Account** and **Price List** fields. The price list determines the categories and products you see in the configuration. The account is auto-populated if the proposal is created from an opportunity.
6. Click **Save**. Navigate to the new quote you just created and proceed with product selection.
7. Click the **Configure Products** button you created for RLS flow, raising the catalog page.
8. Select the products from the catalog page. By default, you do not see products on the catalog page if you have not configured the catalog page with the price list selected for your proposal. Hence, place the cursor in the Find Products search box and click **Enter** on your keyboard. A list of products associated with the selected price list is displayed.
9. Add required products to the cart. Some of the products may require configuration. Click the Configure button to complete the product configuration.
10. Click the Mini-cart () icon to view the summary of added products.
11. In the mini-cart, click **View Cart** to launch the cart in grid view.
12. Click **Finalize** to create a new proposal and open the proposal and quote details.
13. In the Actions section, click **Send Proposal** to open the doc gen page where you can view the generated proposal and such other options as adding supported documents.
14. Click **Email** to display a Send Email pop-up window.

15. Enter **To** and select **Email folder, Email Template**. The Subject text box is automatically generated.
16. Click the **Mark Proposal as "Presented"** checkbox and click **Merge Fields**.
17. Click **Send**. The acceptor will receive an email with the proposal details to verify. After the quote/proposal has been presented to the trading partner either manually or via email, the **Accept** button is enabled. Selecting Accept signifies that the trading partner has accepted the quote.
18. In the Actions section, click **Accept**. The Approval Stage changes to Accepted.
19. Do one of the following:
 - To create an agreement, click **Create Agreement**.
 - To create an agreement with line items, click **Create Agreement with Line Items**.
 - To synchronize the quote with an opportunity, click **Synchronize with Opportunity**.
 - Synchronizing Quote/Proposal With Opportunities: Synchronization ensures that both the quote/proposal and opportunity accurately reflect the current state of the quote. A best practice for sales pipeline reports and forecasts in Salesforce is to display the amount of revenue and the products or services that are forecasted to be sold.

The contracting process begins with the creation of an agreement.

Revenue Admin User Interface

- [Accessing the CPQ Admin Home Page on Conga Platform](#)
- [Configuring Application Settings](#)
- [Managing the Views](#)
- [Product Administration](#)
- [Pricing Administration](#)
- [Diagnostics](#)

Accessing the CPQ Admin Home Page on Conga Platform

The Conga Revenue Lifecycle Platform offers a streamlined login process by leveraging an external Identity Provider (IDP). This IDP integration is established through the widely adopted OAuth 2.0 protocol, facilitating seamless communication between the application and the external identity provider. Additionally, you have the option to sign in using a SAML username.

This approach eliminates the need to create new login credentials specifically for the Conga Platform application. Instead, you can utilize your existing credentials from trusted third-party identity providers or your SAML username for Signin.

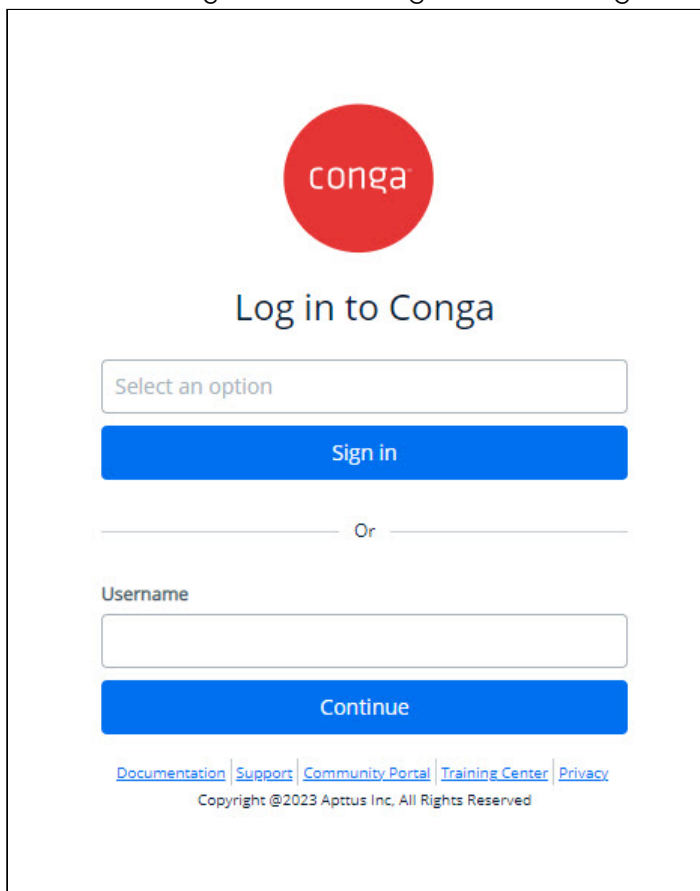
- ✔ You can log in to the same organization with different user credentials using two separate tabs in a single browser window.

Prerequisites

Your Salesforce org must be onboarded on the Conga Revenue Lifecycle Platform. Contact your Conga Representative for the onboarding.

To Sign-in to the Conga Revenue Lifecycle Platform

1. Open the Conga Revenue Lifecycle Platform URL in the web browser. For example, *https://<org Instance URL>.congacloud.io/cadmin*. It will redirect you to the Conga Platform login screen.

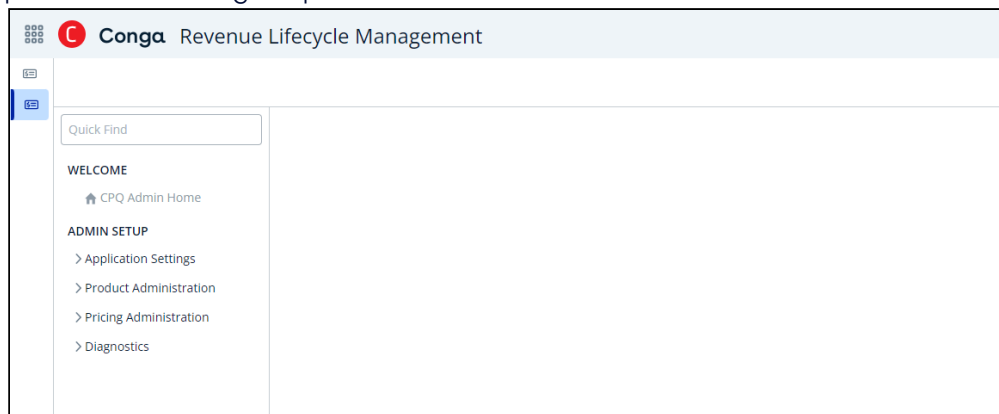


2. Select the Identity Provider option from the list to sign in using IDP credentials or enter your username to use SAML to log in.

ⓘ Conga Platform supports the following identity providers:

- Microsoft
- Salesforce
- Salesforce Sandbox
- Dropbox
- Conga IDP

3. Click **Sign In** or **Continue** depending upon the Sign In method you have selected. You are redirected to the respective Identity Provider or Single Sign-On login screen.
4. Enter your username and password and click **Log In**.
If you forgot your password, follow the selected Identity Provider or Single Sign-On process to reset your password.



Configuring Application Settings

This section provides information on configuring application settings.

- [Configuring Global Settings](#)
- [Configuring Storefront Settings](#)
- [Configuring Flow Settings to Override Global Settings](#)

Configuring Global Settings

Global Settings are default CPQ settings that are applicable to every user. If you need to change the CPQ behavior for certain flows or use cases, you can override the settings at a flow level.

- [Catalog Settings](#)

- [Config Settings](#)
- [Cart Settings](#)
- [Pricing Settings](#)
- [Favorite Settings](#)
- [General Settings](#)
- [Object Summary View Settings](#)
- [Lookup Fields](#)
- [Asset Settings](#)

Catalog Settings

1. Go to **ADMIN SETUP > Application Settings > Global Settings > Catalog**.
2. Enter the following details and click **Save**.

Setting	Description
Display Settings	
Enable Location	Turn this setting on to enable users to select a location for a cart. The line items will have the current cart location assigned to them.
Disable Add Another	Turn this setting on to disable the user from adding multiple instances of the same product.
Hide Configure Action	Turn this setting on to hide the Configure action for a product on the catalog page.
Listed Products Column 2	Select the product field name to be displayed in the listed products section.
Listed Products Column 3	Select the product field name to be displayed in the listed products section.
Hide Single Top Category	Turn this setting on to hide the top category. This setting is useful only when you have a single root category and want to have a cleaner look for all of its child categories, without the root category.

Setting	Description
Enable Category Filter	Turn this setting on to enable Narrow Your Search category filtering during product search. It filters the categories based on search results and displays them in the Narrow Your Search area. For example, if the search result has products from only two categories, the Narrow Your Search section displays only those two categories.
Hide Product Image	Turn this setting on to hide the product image from the catalog page.

Config Settings

1. Go to **ADMIN SETUP > Application Settings > Global Settings > Config**.
2. Enter the following details and click **Save**.

Setting	Description
Display Settings	
Hide Price Column	Turn this setting on to disable the price column from the options page. By default, this setting is turned off.
Listed Options Column 2	Enter the API name of the product field to be displayed in the listed options section.
Listed Options Column 3	Enter the API name of the product field to be displayed in the listed options section.
Show Option Quantity	Turn this setting on to display the quantity in the body of the options pages.
Disable Add To Cart for Option Products	Turn this setting on to hide the Add To Cart and Configure buttons for an option product on the catalog page. This is helpful to prevent your sales representative from selling an option product without its bundle product.
Show Tab View	Turn this setting on to display option groups in a tab view instead of sections on the options page.
Bundle Description Field	Enter the field names from the product object to be displayed as bundle description.

Setting	Description
Enable Option Page Search	Turn this setting on to allow option search on the bundle configuration page.
Collapse All Leaf Option Groups	To define whether the child option groups inside a bundle are expanded or collapsed by default. Turn this setting to save the option group collapse or expanded info in config.
Horizontal Attribute Group View	To display as many attribute groups as possible in a single line in the bundle and Option before moving to the next line. By default, the value for this setting is false.
Miscellaneous	
Enable Field Expressions	Turn this setting on to enable field expressions.

Cart Settings

1. Go to **ADMIN SETUP > Application Settings > Global Settings > Cart**.
2. Enter the following details and click **Save**.

Settings	Description
Display Settings	
Enable Auto Sequencing For Options	Turn this setting on to enable auto sequencing for options. If you do not turn this setting on, the sequencing of option line items on the cart will be based on the user selection sequence rather than the bundle options sequence.
Show Recommended Products Cart View	Turn this setting on to display the recommended products component in the Cart Detail View page.
Product Display Max Length	Enter the maximum number of characters to be displayed for the product name on the cart page. If the product name exceeds the maximum length, CPQ will display the ellipsis or wrap the product name. The default value is 21.

Settings	Description
Show Attributes In Cart	Turn this setting on to display the specified attributes applicable to the line items in the cart. Attributes appear in the product dialog.
Expand Bundles In Cart	Turn this setting on to expand all attributes and options of a bundle product in the cart.
Hide Copy Action	Turn this setting on to hide the copy action in the cart view.
Group By Fields	Enter the API names of those line item fields that are of the type: Lookup, Formula Fields, and Text. These line item fields are displayed under the Group By drop-down on the cart page.
Hide Grand Total	Turn this setting on to hide the grand total line on the cart page.
Hide Subtotals In Cart	Turn this setting on to hide subtotals in the cart view.
View Cart Total Custom Fields	Enter the list of custom fields from the summary group object to be displayed in the custom view cart page. Each field API name must be separated by a comma or a new line.
Enable Contextual Totals	Turn this setting on to display the subtotals and totals section at the bottom of the cart page.
Grid Render Threshold	Enter the number of rows to load when the cart grid renders. This setting improves the grid scroll performance, with a default value of 20. You must adjust the value based on the number of lines to be displayed on the cart.
Hide Cart Views	Turn this setting on to hide cart views on the cart.
Hide Cart Views Creation	Turn this setting on to hide cart views creation.
Column Render Threshold	Enter the number of columns to load when the cart grid renders. This setting improves to improve the grid horizontal scroll performance, with a default value of 10. Must be adjusted to a higher value based on the number of columns displayed in a cart.
Enable Paginated Grid	Turn this setting on to enable pagination for the cart grid.

Settings	Description
Field Set Settings	
Line Item Fields to Revalidate Invalid Price List Items	Select the line item fields to be used to revalidate invalid price list items. This field set controls list of display fields in the revalidation pop-up for price list item changes.
Line Item Fields to Revalidate Product Structures	Select the line item fields to be used to revalidate product structures. This field set controls list of display fields in revalidation pop-up for product structure changes.
Advanced Settings	
Enable Optional Items	Turn this setting on to enable optional items in the cart.
Max Allowed Lines For Mass Actions	Enter the maximum number of line items (supported by the product) to be allowed for performing mass actions on the cart page.
Run Validation Callback On Add	Turn this setting on to invoke the Validation Callback when adding a product.
Save On All Actions	Turn this setting on to save the configuration when you perform any action on the cart page.
Mini Cart Settings	
Hide Selected Products Column1	Turn this setting on to hide the column that displays the product name.
Selected Products Column2	Enter the API name of the line item field to be displayed in the selected products section. Example value: ProductId__r.ProductCode
Selected Products Column3	Enter the API name of the line item field to be displayed in the selected products section. Example value: ProductId__r.ProductCode


Settings	Description
Selected Products Column4	Enter the API name of the line item field to be displayed in the selected products section. Example value: ProductId__r.ProductCode

Pricing Settings

1. Go to **ADMIN SETUP > Application Settings > Global Settings > Pricing**.
2. Enter the following details and click **Save**.

Setting	Description
Global Pricing	
Custom Pricing Fields	Enter the custom field API name from the line item object to be displayed on the cart page. To add more than one field name, separate the names by a new line or a comma. When you makes any changes to these custom fields, CPQ is set to reprice before clicking Review and Finalize .
Hide Dates For One Time Charge	Turn this setting on to hide the dates for price list items of type One Time charge.
Hide Evergreen End Date	Turn this setting on to hide the end date for Evergreen proposals.
Totaling and Sub Totaling	
Totaling Group Type	Select the default value for the summary group type picklist. Supported values are: <ul style="list-style-type: none"> • <i>Category</i>: When you add a product to the cart from the lowest leaf category where it is associated, the Category Hierarchy column in the Line Items related list is populated with its breadcrumb trail. This is useful to identify the exact category from where the product was added, in case if the product is associated with multiple categories • <i>Product</i> • <i>Ad Hoc</i> <p>The default value is <i>Category</i>. For Product-based totaling, the Product Totaling Hierarchy setting is required.</p>

Setting	Description
Disable Charge Type Totaling	Turn this setting on to disable the totaling of charge types.
Adhoc/Product Totaling Hierarchy	<p>Enter the list of product fields that represent the product totaling hierarchy. Each product field API name must be separated by a new line. This is applicable only when product based totaling is in effect.</p> <p>For Ad-hoc totaling, enter the line item fields that represent a totaling group. If this field is blank, the Bundle Family will be used by default.</p>
Matrix and Ruleset	
Auto Refresh Usage Tier	Turn this setting on to enable modifiable usage tiers to automatically re-calculate tier price upon PLI change.
Enable Matrix Pricing For Options	Turn this setting on to enable matrix pricing for options. This may be used to optimize performance when options do not use price matrices in the organization. The default value is false (disabled).
Precision	
Enable Base Price Rounding	Turn this setting on to enable CPQ to round list price and base price fields in the line item using the currency field precision setting.

Setting	Description
Enable Custom Rounding	<p>Turn this setting on to enable rounding of selling term and price in each price calculation step.</p> <ul style="list-style-type: none"> • Rounding of Selling Term: This setting considers the precision of selling term defined in the Term Field Precision setting and rounds the selling term consistently both on the UI and in backend calculation. • Rounding of Pricing: This setting rounds the price in each price calculation step considering the precision defined for each currency, both on the UI and in backend calculations. The amount in price calculation steps (for list price, base price, adjusted price, and net price only after each step such as price matrix, price ruleset, line level manual adjustment, group adjustment) is calculated considering the precision of the currency. <div data-bbox="564 931 1426 1055" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> Price rounding at backend occurs only for the base price, adjusted price, and net price when this setting is enabled.</p> </div>
Rounding Mode	<p>Select the currency rounding mode in pricing calculations. This setting rounds adjustments before calculating the base price. Supported values are:</p> <ul style="list-style-type: none"> • UP: Rounds the currency to the next number. For example, 21.2 is rounded to 22. • DOWN: Rounds the currency to the previous number. For example, 21.8 is rounded to 21. • HALF_UP: Rounds the currency to the next number if the decimal is equal to or greater than 5. For example, 21.5 to 21.9 is rounded to 22. • HALF_DOWN: Rounds the currency to the previous number if the decimal is equal to or smaller than 5. For example, 21.1 to 21.5 is rounded to 21. • HALF_EVEN: Rounds the currency to the nearest even number. For example, 23.5 is rounded to 24 and 22.5 is rounded to 22.
Adjustment	
Max Adjustment Lines	Enter the maximum number of adjustment lines allowed for a line item.

Setting	Description
Enable Adjustment Spread	Turn this setting on to enable the adjustment on a bundle to spread to its options.
Enable Base Price Adjustment	Turn this setting on to enable unit level price adjustment for the Base Price of the product in the cart.
Advance Pricing	
Product Option Price Order	<p>Enter the order of execution of option pricing (with adjustments) in conjunction with the price rule set and matrices. Supported values are:</p> <ul style="list-style-type: none"> • <i>First</i>: CPQ applies the adjustments before the price rulesets and after price matrices. • <i>Last</i>: CPQ applies the adjustments after the price rulesets. This is the default value.
Related Price Scope	<p>Enter a value to perform the related pricing calculations over the entire cart or confine the calculations to a bundle product only. For example, if the price of an option product is a percentage of another option product in the same bundle, consider the following scenarios with Related Price Scope = <i>Cart</i> and <i>Bundle</i>:</p> <ul style="list-style-type: none"> • <i>Cart</i>: The option price is based on the price of all the instances of the related product in the cart, whether it is in the same bundle or a standalone, or in another Bundle. • <i>Bundle</i>: The option price is based on the related product instances within the same bundle.

Setting	Description
Selling Term Calculation Method	<p>Indicates the method to calculate the selling term for line items on the cart page.</p> <p>Supported values are:</p> <ul style="list-style-type: none"> • Calendar: The selling term is calculated based on the calendar. This is the default method. • Billing Preference: The selling term is calculated based on the billing preferences. You can price transactions based on the term calculated according to the user's preferred start day instead of it always being the first of the month. When the Conga Billing package is installed, you must set the Selling Term Calculation Method setting to Billing Preference. CPQ then calculates the selling term based on the billing preferences.
Enable Price Matrix Audit Trail	<p>Turn this setting on enable CPQ to create audit trail entries when adjustments are applied on the Line Item through Price Matrices. The audit trail entries are created on the Adjustment Line Item object.</p>
Enable Price Rule Audit Trail	<p>Turn this setting on enable CPQ to create audit trail entries when promotions are applied on the Line Item through Price Rules. The audit trails entries are created on the Adjustment Line Item object.</p>

Favorite Settings

1. Go to **ADMIN SETUP > Application Settings > Global Settings > Favorite.**
2. Enter the following details and click **Save.**

Setting	Description
Disable Favorites	<p>Turn this setting on to disable the Favorites category on the catalog, Save As My Fav button on the cart and any UI elements related to Favorite Configurations on catalog, configuration and cart pages. By default, this setting is turned off.</p>

Setting	Description
Listed Favorite Configuration Column1	Select the favorite configuration field to be display on the catalog page for your favorite configuration records. You can enter a maximum of one API name. If you have a requirement of displaying one more field, use the Listed Favorite Configurations Column 2 setting.
Listed Favorite Configuration Column2	Select the favorite configuration field to be displayed on the catalog page for your favorite configuration records. You can enter a maximum of one API name.
Favorite Filter Fields	Select the fields from the favorite configuration object to be used as filters on the catalog page.
Favorites Display Label	Enter a label for favorites. This label is displayed as a category name on the catalog page. If this field is blank, CPQ defaults the label to "Favorites".
Show Favorite as First Category	Turn this setting on to display your favorites category as the first category displayed in the default catalog view.
Favorite Category Image	Upload an image for your group of favorite configuration category. This image is displayed under your favorite category (as entered in Favorites Display Label) on the catalog page.

General Settings

1. Go to **ADMIN SETUP > Application Settings > Global Settings > General**.
2. Enter the following details and click **Save**.

Setting	Description
System Global	
Keep Abandoned Carts	Turn this setting on to indicate whether abandoned carts must be kept.

Setting	Description
Bypass Shopping Cart	Turn this setting on to bypass the shopping cart. CPQ displays the Update Price and Finalize buttons and hides the Go To Pricing button on the configuration page.
Line Items Per Page	Enter the number of line items to be displayed on the Cart page and Installed Products page. The default value for this field is 10.
Field Precision	
Percentage Field Precision	Enter a number to specify decimal places for percentage precision.
Currency Field Precision	Enter a number to specify decimal places for currency precision.
Quantity Field Precision	Enter a number to specify decimal places for quantity precision.
Term Field Precision	Enter a number to specify decimal places for selling term precision.
Finalization and Approvals	
Auto Finalize On Cart Approval	Turn this setting on to indicate whether the cart is auto finalized. CPQ automatically finalizes the cart when approved and ready for finalization.
Auto Sync On Cart Approval	Turn this setting on to indicate whether the cart is auto synchronized. CPQ automatically synchronizes the cart when approved and ready for finalization.

Object Summary View Settings

You must configure object summary view settings to display the summary information for the proposal (cart header), product, and account.

If there is no **Object Summary Setting** configured, only the name will be displayed by default when you open the Proposal, Product, and Account summary pop-up.

1. Go to **ADMIN SETUP > Application Settings > Global Settings > Object Summary View**. The Object Summary View page is displayed.
2. Configure the following details and click **Save**.

For Proposal Summary

Field Name	Description
Name	Enter the name as "Proposal Summary".
Object Name	Select the object name as "Proposal".
Display Fields	Select proposal field names. You can select any field from the proposal.

When you click the proposal name on the catalog page, you will see proposal summary with the fields configured in Proposal Summary.

For Product Summary

Field Name	Description
Name	Enter the name as "Product Summary".
Object Name	Select the object name as "Product".
Display Fields	Select product field names. You can select any field from the product.

When you click the product name on the catalog page, you will see product summary page with the fields configured in Product Summary.

For Account Summary

Field Name	Description
Name	Enter the name as "Account Summary".
Object Name	Select the object name as "Account".
Display Fields	Select account field names. You can select any field from the account.

When you click the account name on the catalog page, you will see account summary page with the fields configured in Account Summary.

Lookup Fields

Lookup field settings provide an ability to filter lookup records through filter criteria based on the immediate parent on which the lookup field is defined.

Managing Lookup Fields


When you launch the Lookup Fields page on the UI, all the existing lookup fields are listed on this page along with their details. There are various functionalities available for you to manage the lookup fields.

Lookup Fields Search

You can narrow down the lookup fields list using the search feature. You can either define search criteria to search for a range of lookup fields or use the lookup fields search option.


Basic Search

In basic search, you can search for a lookup field using keywords. For example, you can search using the name of the lookup field.

1. In the **Search this list** field, enter a keyword related to your lookup field details such as lookup field name.
2. Click the search icon  or press Enter. CPQ returns all lookup fields that contain that keyword in the lookup field details.

Advanced Search

In advanced search, you can search for a lookup field using a search query.


1. Click the Advanced Search icon . The Advanced Search pop-up is displayed.
2. Enter the following details:
 - a. **Field:** All lookup field are available in the drop-down list such as Text, Checkbox, Date, Date/Time, Number, Percent, Picklist, Multi-Select Picklist, Currency.
 - b. **Operator:** Operators that are available for selection helps create the filter expression. Operators are displayed based on the field types. For example, a picklist value will display equal to and not equal operators and a text field will display equal to, not equal to, starts with, contain, does not contain operators. If it is a multi-value picklist, the application displays include and does not include operators.
 - c. **Value:** Enter a value.
3. Click **Add Criteria** if you want add more criteria in the advanced search.

4. Turn the **Logic** button on if you have more than one criteria and enter a value in the **Logic** field.
5. Click **Apply** to enable the search filter. CPQ returns all lookup fields that match the criteria.

Sorting lookup fields

You can sort the lookup fields by clicking the column names. The lookup fields are sorted in descending order using the last modified date. Every time you click the column name, the sorting switches between ascending and descending order. You can adjust the column width by dragging the columns. Hover near the column boundaries till two-way arrow appears. Click when the arrow appears and drag left or right to adjust the column width.

Actions available on this page

- Click **Create New** to create a lookup field.
- Click the ellipsis icon  next to the lookup field name to edit or delete a lookup field.
- Click the lookup field name link to open the lookup field details page.

Items per page

At the bottom of the page, you can see the total count of lookup fields available. You can control the number of lookup fields to be displayed on each page. You can select the number of lookup fields from a predefined list. You cannot configure this list. By default, you see 20 records on each page.

By default, you can sort 10, 20, 30, 50, and 100 lookup fields per page using the **Rows per page** drop-down. This feature works in association with the search and filter functions to display search records per page. You can use the < and > buttons to move to the next or the previous pages. You can also jump to a certain page using the page search component.

Creating a Lookup Field

- You can create multiple duplicate lookup settings for the same Object-Field combination. When you retrieve lookup records, any of these settings might be used randomly, resulting in lookup records to vary.
- The acceptance criteria specify a maximum limit of 1000 records. So, you can retrieve up to 1000 records regardless of the total record count for that entity.
- Use only supported operators in filter criteria when creating LookupFieldSettings. The supported operators are =, !=, and OR.

To create a lookup field


1. Go to **ADMIN SETUP > Application Settings > Global Settings > Lookup Fields**.
2. Click **Create New**.
3. Enter the following details:

Field	Description
Name	Enter a name for the lookup field.
Object Name	Select the name of the object where the lookup field exists. The supported value is a Line Item.
Lookup Field Name	Select the name for the lookup field. This is the name of the lookup field on the Line Item object.
Lookup Display Columns	Select the names of columns to be displayed on the lookup pop-up. You can select multiple columns.
Filter Criteria	<p>Enter a formula to filter lookup values. The formula must be a valid expression to further filter down the search results for a lookup.</p> <ol style="list-style-type: none"> a. Click the f(x) button to view the filter criteria pop-up. b. Enter a filter criteria and click Add. The supported operators are :-, ==, !=, OR.
Lookup Record Limit	Enter the maximum number of records to query for the lookup field drop-down. By default, the value 200 is entered and you can specify up to 1000.
Enable Quick View	Turn this setting on to enable CPQ to populate the values in lookup fields on the cart page. If you disable the setting, the sales representative must search the values. CPQ performance is optimized if you disable this setting as the lookup values are retrieved on the cart page only when the sales representative clicks the search icon. Conga recommends disabling the setting for lookup fields with a large number of lookup records and also only enabling the setting for a maximum of two lookup fields on the cart.


4. Click **Save**.

To edit a lookup field

1. Go to **ADMIN SETUP > Application Settings > Global Settings > Lookup Fields**. The Lookup Fields page is displayed.

2. Click the ellipsis icon  next to the lookup field name and click **Edit**. The lookup field details page is displayed.
3. Edit the required fields.
4. Click **Confirm**.

To delete a lookup field

1. Go to **ADMIN SETUP > Application Settings > Global Settings > Lookup Fields**. The Lookup Fields page is displayed.
2. Click the ellipsis icon  next to the lookup field name and click **Delete**. The Delete Lookup Field Setting pop-up is displayed.
3. Click **Confirm**.

Asset Settings

1. Go to **ADMIN SETUP > Application Settings > Global Settings > Asset**.
2. Enter the following details and click **Save**:

Setting	Description
General Setting	
Default Asset Pricing Indicator	Turning on this setting Indicates whether asset pricing is enabled by default for asset-related line items.
Hide Assets Action	Select one or more actions to be hidden on the installed products page. Selected actions will be hidden from the users. All the actions are displayed if the value is empty. Select from: <ul style="list-style-type: none"> • Cancel • Relate • Swap • Renew • Terminate

Setting	Description
Submenu Action	Select one or multiple actions to be displayed in the asset action submenu dropdown. Select from: <ul style="list-style-type: none"> • Change Merge • Change Split • Change Configuration • Relate Component • Change Quantity
Asset Source	Indicates the account source which the asset line items will be retrieved from. Select from: <ul style="list-style-type: none"> • Bill To • Ship To • Sold To
Show Assets	Decide which assets to display from the current, parent, or child assets of the current asset's account. Use a comma-separated string of Parents and Children. If empty, only assets related to the context account are shown.
Filter Fields	Enter the Asset Line Fields to be displayed on the filter. Supported values are text fields and End Date.
Show Account Filters	Turn on this setting to display the accounts filter on the installed products page.
Hide Co-term	Turn on this setting to hide the co-term end date on the renew.
Apply Adj To Current Contract Term	Turn on this setting to keep the discounting limited to the current contract term.
Enable Default Quantity For ABO Item	Turn on this setting to enable the default quantity for the ABO item.
Enable Price Rule for Assets	Turn on this setting to enable the price rule adjustments to the assets.

Setting	Description
Asset Restore Fields	Select the fields to be restored during Amend and Renew operations, with the system restoring original asset values for these fields and defaulting Start and End dates from assets.
Renewal	
Base Price Defaulting Method For Renewal	Indicates how the base price should be defaulted when the asset is renewed. The supported Values are: Net Unit Price (default if not specified) Higher Of Contract Unit Price / Net Unit Price Lower Of Contract Unit Price / Net Unit Price.
Default Renewal Term	When the value is provided use this value as the renewal term for Renewing products. The number signifies months to renew as the end date.
Renew One Ramp	Turn on this setting to renew only one ramp line item based on the new term in order of renewal term in the asset line item, default renewal term in installed product setting and selling term in the asset line item.
Renewal Business Object Type	Select the quote or agreement object used in renewal product configuration. Select from: <ul style="list-style-type: none"> • Proposal (Default) • Agreement
Renewal Execution Mode	Select the mode of Renewal Quote/Agreement generation. Select from: <ul style="list-style-type: none"> • Auto (Default) • On Demand
Renewal Group Fields	Select one or multiple asset line item fields to group for Renewal quote/ agreement.
Renewal Lead Time	Enter the renewal lead time in number of days to satisfy On-demand renewal Quote/agreement generation. This is assets expiration days from system date.
Amend	
Enable One Time Change	Turn on this setting to allow users to make changes to one timeline item.

Setting	Description
Bypass Must Configure	Turn on this setting to allow to selection of multiple assets for Amend operation including must required bundle asset.
End Date Preferences For Co-term	Select the end date preferences for the Co-term. the supported values are use Custom Date, Use Proposal EndDate, and Retain Current Asset End Date.
Change-Split Asset Actions	Specify the actions that can be performed on a split asset. The supported values are Amend, Renew, and Swap.
Purchase Identification Criteria	Identify the fields that determine the eligibility for co-term and the cumulation of the quantity. A list of comma-separated asset line item fields that determine the eligibility for co-term and quantity cumulation.
Merge Action Criteria Fields	List of asset line item fields separated by comma to enable merge asset action.
Termination	
Same Day Cancellation	Turn on this setting to check out the Same Day Cancellation option will provide behaviour where cancellation will be done on the same day, unchecking it will mean Cancellation will be using cancel day + 1 behaviour.
Editable Fields For Cancelled Lines	A comma-separated list of editable asset line item fields for cancelled lines.

Configuring Storefront Settings

You can configure storefronts.


Navigating the Storefront Settings Page

When you launch the storefront settings, the Storefront Settings page is displayed. All the existing settings are listed on this page with their details. There are various functionalities available for you to manage the storefront settings.

Storefront Setting Search

Search for the storefront to narrow down the storefront list using the Search this list box. Enter a keyword related to your storefront details such as storefront name. Search this list box returns all the storefronts that contain that keyword in the storefront details.

Actions available on this page

- Click **Create New** to create a new storefront.
- Click the ellipsis icon  to edit or delete an existing storefront.
- Click the storefront name link to open the storefront details page.
- Export the selected storefront settings. For more information, see [Exporting Records](#).

Items per page

At the bottom of the page, you can see the total count of storefront settings available. You can control the number of storefront settings to be displayed on each page. You can select the number of storefront settings from a predefined list. You cannot configure this list. By default, you see 20 records on each page.

By default, you can sort 10, 20, 30, 50, and 100 storefront settings per page using the **Rows per page** drop-down. This feature works in association with the search and filter functions to display search records per page. You can use the < and > buttons to move to the next or the previous pages. You can also jump to a certain page using the page search component.

Creating Storefront Settings

To create a Storefront setting

1. Go to **ADMIN SETUP > Application Settings > Storefront Settings**. The Storefront Settings page is displayed.
2. Click the **Create New** button. The Add new storefront popup is displayed.
3. Enter the following details:

Field	Description
Storefront Name	Enter a name for the Storefront.
Channel Type	Select the the type of channel.


Field	Description
Default Account	Enter the account used for guest users or if user is not associated to an account.
Default Pricelist	Select the price list. The storefront will show catalog based on this unless the cart or the account has a different price list.
Guest User ID	Enter the account associated with guest users on this storefront.
Default Flow	Select the flow houses settings for enabling features like system and testflow in the storefront.

4. Click **Create**. A storefront setting is created.

Help



There is a Help info button which, when clicked, directs users to the relevant documentation.

To delete a Storefront Setting

1. Go to **ADMIN SETUP > Application Settings > Storefront Settings**
2. The Storefront Settings page is displayed.
3. Search for the storefront setting you want to delete.
4. Click the ellipsis icon  next to the storefront setting name and click **Delete**. The Remove Storefront page is displayed.
5. Click **Confirm**.

To edit a Storefront Setting

1. Go to **ADMIN SETUP > Application Settings > Storefront Settings**
2. The Storefront Settings page is displayed.
3. Search for the storefront setting you want to delete.

4. Click the ellipsis icon  next to the storefront setting name and click **Edit**. The selected storefront setting page is displayed.
5.
 - a. Click the delete icon  to remove the feature.
 - b. Click **Remove All** to remove all features.

Make changes to these fields if required:

Field	Description
Default Locale	The storefront will use this locale if user doesn't have locale or they are guest user.
Storefront Name	Enter the name of the storefront.
Default Price List	Select the price list. The storefront will show catalog based on this unless the cart or the account has a different price list.
Channel Type	Select the the type of channel.
Default Flow	Select the flow houses settings for enabling features like system and testflow in the storefront.
Default Account	Enter the account used for guest users or if user is not associated to an account.
Guest User ID	Enter the account associated with guest users on this storefront.




6. Click **Save**.

Deleting Storefront Settings

You can delete storefront settings that are no longer required for your business requirements.

To delete a storefront setting

1. Go to **ADMIN SETUP > Application Setting > Storefront Setting**. The storefront settings page is displayed.
2. Search for the storefront setting and do one of the following:

- To delete a single storefront setting, click the ellipsis icon () next to the rollup name, and click **Delete**.
 - To delete multiple storefront settings, click the checkboxes next to the name column, and click the () icon.
 - To delete all the storefront settings, click the checkbox in the header row next to the name column, and click the () icon.
3. Click **Confirm**.

Configuring Flow Settings to Override Global Settings

You can configure flows to override global settings. Flow settings are required so that appropriate pages are loaded for various sections (such as Catalog, Configuration, Cart, and Asset).


Navigating the Flow Settings Page

When you launch the flow settings, the Flow Settings page is displayed. All the existing flows are listed on this page with their details. There are various functionalities available for you to manage the flows.

Flow Search

Search for the flow to narrow down the flow list using the Search this list box. Enter a keyword related to your flow details such as flow name. Search this list box returns all the flows that contain that keyword in the flow details.

Actions available on this page

- Click **Create New** to create a new flow.
- Click the ellipsis icon  to edit or delete an existing flow.
- Click the flow name link to open the flow details page where you can define override settings.
- Export the selected flow settings. For more information, see [Exporting Records](#).

Items per page

At the bottom of the page, you can see the total count of flows available. You can control the number of flows to be displayed on each page. You can select the number of flows from a predefined list. You cannot configure this list. By default, you see 20 records on each page.

By default, you can sort 10, 20, 30, 50, and 100 flows per page using the **Rows per page** drop-down. This feature works in association with the search and filter functions to display search records per page. You can use the < and > buttons to move to the next or the previous pages. You can also jump to a certain page using the page search component.

Configuring Action Settings

You can configure display action setting for various flows for:

- the cart page so that the respective action is available on the cart page
- the config page so that the respective action is available on the bundle and attribute page
- the catalog page so that respective action is available on the catalog page



To configure action settings


1. Go to **ADMIN SETUP > Application Settings > Flow Settings**.
2. Click the required flow name link. The Flow Settings page is displayed.
3. Under FLOW SETTINGS, click one of the following options:
 - **Cart Page:** To configure actions on the cart page.
 - **Catalog Page:** To configure actions on the catalog page.
 - **Config Page:** To configure actions on the config page.
 - **Asset Page:** To configure actions on the asset page.
 - **Price Waterfall Page:** To configure actions on the price waterfall page.
4. Click the **Action Settings** tab, enter the following details:


Field	Description
Action	Select this to set the action as an action button. You cannot edit it. For custom action addition, this field is defaulted with "CustomAction"+Sequence#. For example, CustomAction16. This column is freezed as the first column.
Action Label Name	It is populated based on the action you selected. This field is editable only for custom actions added by you. You can enter a text for label.

Field	Description
Display As	<p>Select an option for how the action must be displayed. It defines whether an action must be displayed as Action or Task.</p> <p>Supported values are:</p> <ul style="list-style-type: none"> • Action • Task • Action and Task • Sidebar Action • Nav Link • Help
Action Area	<p>Select a position of the action. Supported values are:</p> <ul style="list-style-type: none"> • Center • Left • Right • More
Action Class Style	<p>Enter a class style name for the action. For example,</p> <ul style="list-style-type: none"> • apt-selected-btn • apt-left-btn • apt-right-btn
Action Page	<p>This field is editable only for custom actions added by you. For custom actions, custom Visualforce pages can be invoked for respective actions with Action Params.</p>
Action Param	<p>This field is editable only for custom actions added by you. For a few actions, parameter value can be passed such as Express Quote.</p>
Behaviour	<p>This field is editable only for custom actions added by you. Select a behavior where to open the page. Supported values are:</p> <ul style="list-style-type: none"> • Dialog Window • New Window • Self

Field	Description
Action Type	This field is editable only for custom actions added by you. Supported values are: <ul style="list-style-type: none"> • Quick Redirect • Save • Quick Save • Generate • Submit For Approvals
Is Enabled	Turn this setting on to enable the action. It is applicable for all actions.
Always Display	Turn this setting on to enable permanent display of the action regardless of the Action Type setting. It is applicable for all actions.

- Click **Add New** or the add icon  to add an action (custom button).
- Click the delete icon  to delete an action.

 The delete icon is visible only for custom actions added by you.

- Drag the display actions using the icon  next to a display type to rearrange the cart action sequence for the cart page.
- Enter an action name in the **Search this list** box and press enter to search an action.
- Click **Discard Changes** to discard the changes you made to this page.
- Click **Save**.

Configuring Column Settings

You can configure display column setting for various flows for different display types such as Cart Total Line Item and Price Ramp.

- Go to **ADMIN SETUP > Application Settings > Flow Settings**.
- Click the required flow name link. The Flow Settings page is displayed.
- Under FLOW SETTINGS, click one of the following options:
 - **Cart Page:** To configure columns on the cart page.
 - **Catalog Page:** To configure columns on the catalog page.
 - **Config Page:** To configure columns on the config page.
 - **Asset Page:** To configure columns on the asset page.
 - **Price Waterfall:** To configure columns on price waterfall.

4. Click the required display type. Supported display types are:

- For Cart Page

Display Type	Purpose
Cart Line Item	You can configure the list of fields to display on the Cart Line Item.
Total Columns	You can configure a list of fields to display on the Cart Summary Group.
Price Ramp	You can configure a list of fields to display on the Price Ramp pop-up on the cart.
Usage Price Tier	You can configure a list of fields to display on the Usage Price Tier pop-up on the cart.
Tiered Price	You can configure a list of fields to display on the Tiered Price pop-up on the cart.
Related Price	You can configure a list of fields to display on the Related Price pop-up on the cart.
Adjustment Line Item	You can configure a list of fields to display on the Adjustment Line Item pop-up on the cart.
Mass Update	You can configure a list of fields to display on the Mass Update pop-up on the cart.
Agreement Price Rule	You can configure a list of fields to display on the Agreement Price Rule on the cart.

- For Asset Page


Display Type	Purpose
Asset Line Item	You can configure list of fields to display on the Asset Line Item.
Asset Termination	You can configure list of fields to display on the Termination intermediate page.

- For Price Waterfall

Display Type	Purpose
Waterfall Elements	You can configure list of fields to display on the Waterfall Elements.

5. Enter the following details:

Field	Description
Field Name	Select a field from the respective entity.
Style	Enter a value. For example, text-align:right, text-align:left, and width:60px
Style Class	Enter a value. For example, aptCurrency, aptQuantity, and aptAdjustmentType
Header Style	Enter a value. For example, width:200px
Is Editable	Turn this setting on to make the field name column editable.

 For Asset Termination section, you will have the following fields in the picklist.

- Termination Date (default field, user should not be able to delete this field)
- Billed Through Date
- Total Billing
- Invoiced
- Pending billing
- Estimated Credit
- fields from "Editable fields for Cancelled lines". For more information on this, see Asset Settings.

6. Click **Add New** or the add icon (+) to add a column.
7. Click the **Delete** icon (🗑️) to delete a column.
8. Enter a field name in the **Search this list** box and press enter to search a field.

9. Drag the display columns using the icon (☰) next to a display type to rearrange the cart action sequence for the cart page.
10. Click **Discard Changes** to discard the changes you made to this page.
11. Click **Save**.

Configuring the Flows


This section provides information on configuring flows.

Creating a flow


1. Go to **ADMIN SETUP > Application Settings > Flow Settings**.
2. Click **Create New**. The New Flow pop-up is displayed.
3. Enter the following details:
 - **Flow Name**: Enter a name for the flow.
 - **Description**: Enter a description for the flow.
4. Click **Create**.

A flow is created and saved.

Editing a flow

1. Go to **ADMIN SETUP > Application Settings > Flow Settings**.
2. Search for the flow you want to edit.
3. Click the ellipsis icon  next to the flow name and click **Edit**. The Edit Flow pop-up is displayed.
4. Edit the description and click **Save**.

Deleting a flow

1. Go to **ADMIN SETUP > Application Settings > Flow Settings**.
2. Search for the flow you want to delete.
3. Click the ellipsis icon  next to the flow name and click **Delete**. The Remove Flow Setting pop-up is displayed.
4. Click **Confirm**.

Managing Views

You can configure views for various flows to define the list of columns available for various views for various users, roles, and profiles.

1. Go to **ADMIN SETUP > Application Settings > Flow Settings**.





2. Click the required flow name link. The Flow Settings page is displayed.
3. Under FLOW SETTINGS, click one of the following options and complete the settings:
 - **Cart Page:** To configure the actions on the cart page.
 - **Catalog Page:** To configure the actions on the Catalog page.
 - **Config Page:** To configure config page views on the cart page.
 - **Asset Page:** To configure Asset Views on the asset page.
 - **Override Settings:** To configure Cart Views on the cart page.
 - **Price Waterfall:** To configure Cart Views on the cart page.
4. Click **Discard Changes** to discard the changes you made to this page.
5. Click **Save**.

Overriding Global Settings at a Flow Level

You can override the global settings (settings defined at system level) at a flow level so that you can define a specific CPQ behavior at the flow level.

1. Go to **ADMIN SETUP > Application Settings > Flow Settings**.
2. Search for the flow in which you want to define override settings.
3. Click the flow name link. The flow details page is displayed.
4. Enter the following details for override settings:

Setting	Description
Hide asset actions	Enter comma-separated values of Increment, Amend, Renew, and Cancel actions. Listed actions will be hidden from the users. You can configure asset actions at each asset line item.
Service line split criteria	Enter comma-separated values of asset line item which define the split criteria for asset-related line items. This setting only supports API names of the fields created on the Related Line Item object only. These fields can be formula fields and can fetch their values from asset line item and product through formula expressions.
CSS override	Enter the name of the static resource to override CSS in the catalog, attributes, options, and cart pages.
Listed products column 2	Enter the API name of the product field to be displayed in the listed options section.

Setting	Description
Listed products column 3	Enter the API name of the product field to be displayed in the listed options section.
Expand bundled items in cart.	Turn this setting on to expand all attributes and options of a bundle product in the cart.
Items per page	Enter the number of browsed or searched products to show on the product selection page. <div style="border: 1px solid #ccc; padding: 5px; background-color: #fff9c4; margin-top: 10px;">  Valid values are: 5, 10, 15, 20, & 25 </div>
Selected products per page	Enter the number of selected products that you want to display on the configuration pages. <div style="border: 1px solid #ccc; padding: 5px; background-color: #fff9c4; margin-top: 10px;">  Valid values are 5, 10, 15, 20, and 25. </div>
Option items per page	Enter the number of displayed option products to show in the cart page. <div style="border: 1px solid #ccc; padding: 5px; background-color: #fff9c4; margin-top: 10px;">  Valid values are 5, 10, 15, 20, and 25. </div>
Catalog products per page	Enter the number of catalog products that you want to display on the Catalog page. <div style="border: 1px solid #ccc; padding: 5px; background-color: #fff9c4; margin-top: 10px;">  Valid values are: 10, 20, 50, and 100. </div>

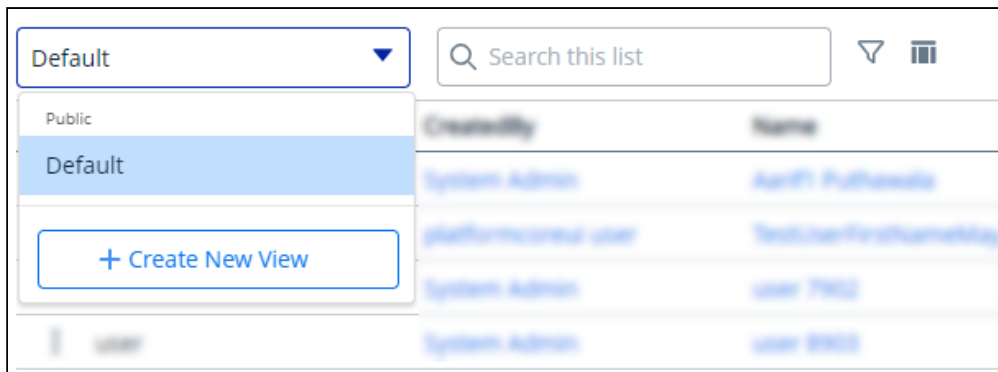
Managing the Views

The Conga Platform application allows you to save your filtered view of a record and set it as the default view, so there is no need to reselect the filters every time you open the grid (list) view.

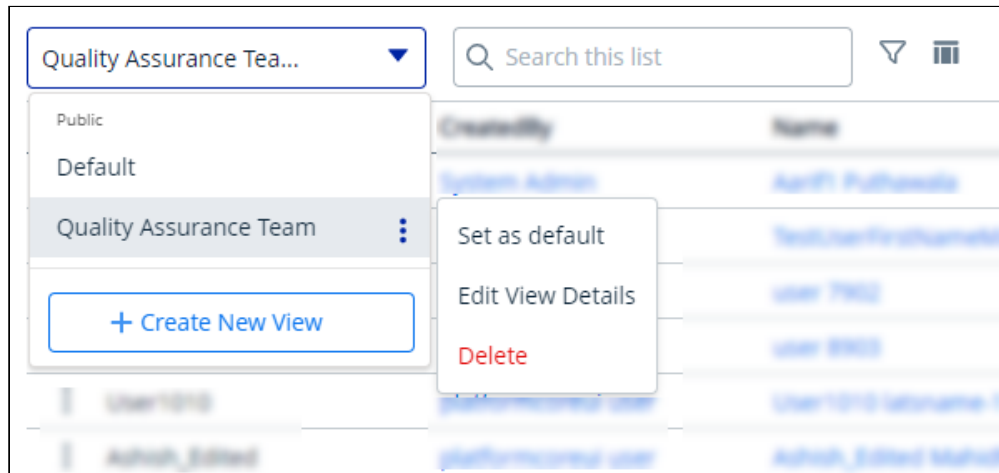
To save your personalized view

1. Log in to the Conga Platform as an admin user.
2. Go to the page containing the grid view you want to filter.

3. Customize your view by applying filter criteria:
 - **Filtering Options:** Use the available filtering options to set criteria for your view. This might involve selecting specific fields, setting conditions, and choosing values for those conditions. For more details, see [Filtering Records in the Grid View](#).
 - **Managing View Settings:** Apply the view setting to control which columns to display in the grid view. For more details, see [Managing the View Settings](#).
 - **Rows per Page and Page Number:** Specify the number of records to see per page using the Rows per Page option. Enter the page number in the designated box to set the default page when applying the view.
 - **Sorting:** Apply column sorting for better navigation.
4. Go to the dropdown menu next to the search bar and click **Create New View**. The Save View popup appears.



5. Enter a name and description for your view.
6. You can save your view as either Private or Public:
 - **Private:** Select this to restrict the search view to yourself only. It remains private and accessible only to you.
 - **Public:** Select this to permit others to access and use your search view. Your search view will be made public, allowing others to view and use the same search criteria.
7. Click **Save** to save your filtered view.
8. To access your saved view, click the dropdown menu to the left of the search bar.
9. Click the More (⋮) icon for the view from the list and select **Set as default**.



The grid view updates and displays records based on the saved filter criteria. The system retains the applied filter, showing it in the grid view when you return after switching screens.

To edit a saved view

1. Click the More (⋮) icon for the relevant view from the list and select **Edit**.
2. Make the necessary changes.
3. Click **Update**.


To delete a saved view

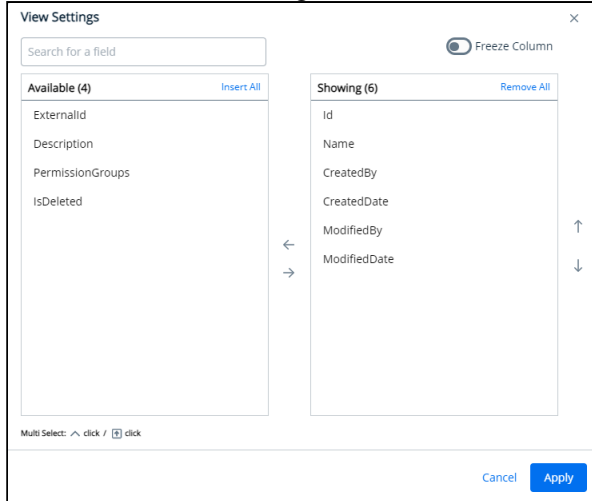
1. Click the More (⋮) icon for the relevant view from the list and select **Delete**.
2. From the confirmation dialog, click **Confirm**.



Managing the View Settings

View Setting allows you to control which columns are displayed in the grid, freeze/pin a column range, rearrange the column order, and change the column width by resizing the necessary columns. You can then save your filtered view of a record and set it as the default view, so there is no need to reselect the filters and rearrange the column every time you open the Grid View (List View). For more information, see [Managing the Views](#).


To add or remove columns from the grid

1. Click the **View Setting** () icon. A View Settings dialog box appears.



2. To remove a column from the grid, highlight it in the right section and click the minus-sign () icon.
3. To add a column to the grid, highlight it in the left section and click the plus-sign () icon. You can use the search box available above the section to search for a specific field.
4. To add or remove more than one column, use Ctrl-Click or Shift-Click to highlight the columns, then click **Add/Remove Selected Fields** (left and right arrows).
5. To add or remove all columns, click **Insert/Remove All**.
At least one column must be displayed in the grid.
6. Click **Apply** to close the dialog and apply view settings to the grid. Or click **Apply and Save to View** to apply view settings and save them to the current view (if any).


To rearrange columns in the grid

1. Click the **View Setting** () icon to open the View Settings dialog.
2. In the right section, click and drag a column name to move it before or after another column in the list.
3. To move a column up or down one place in the order, hover your cursor over the column name and click the up or down arrow.
4. To change the position of more than one column, use Shift-Click to highlight the columns and click the up or down arrow to the right of the section to move the selected columns.

5. Click **Apply** to close the dialog and apply view settings to the grid. Or click **Apply and Save to View** to apply view settings and save them to the current view (if any).

To freeze/pin columns

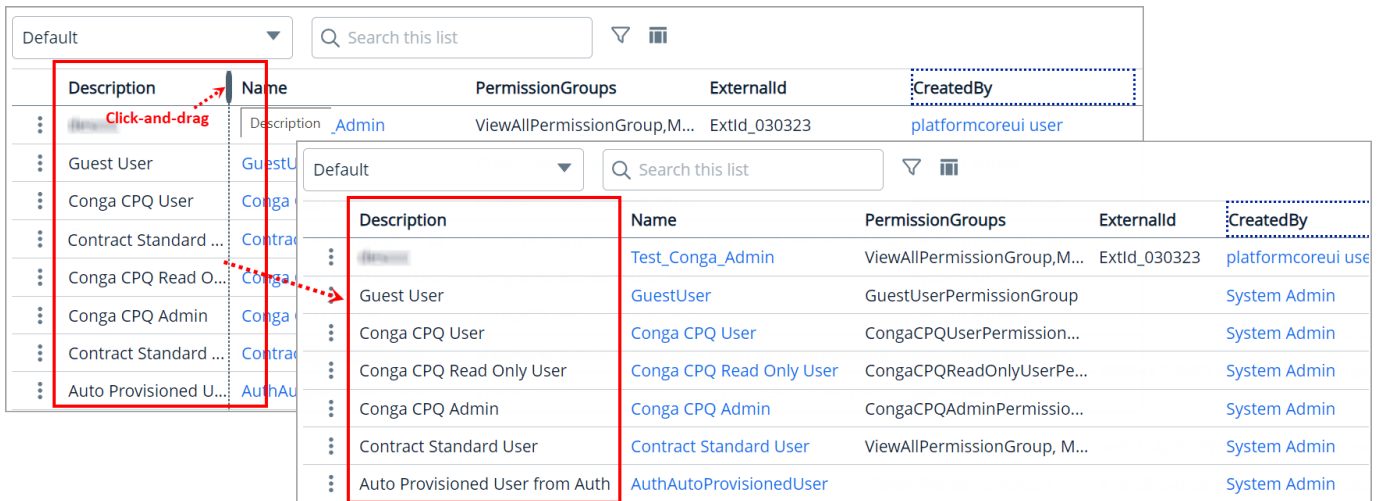
When four or more column items are added to the showing panel, you can enable the **Freeze Column** toggle.

1. Click the **View Setting** () icon to open the View Settings dialog.
2. Enable the **Freeze Column** toggle. You can see two sliders (one at the top after the first column and the second at the last).
3. Click and drag the top and bottom sliders to define the range of visible columns to be pinned.
4. Click **Apply** to close the dialog and apply view settings to the grid.

To resize the column width

1. Navigate to the column for which you want to resize the width.
2. Click and drag the edge of the column.

You can resize columns, but not rows. Columns don't retain their sizes, so the next time you open the list page you will have to resize the column again.



Filtering Records in Grid View

You can filter the view of records in the grid by performing a keyword search, filtering the list by column value, or applying one or more advanced filters and filter logic. You can then save your filtered view of a record and set it as the default view, so there is no need to

reselect the filters every time you open the Grid View (List View). For more information, see [Managing Views](#).


After applying a column filter, if the user tries to apply a keyword or advance search, the column filter criteria will not be retained, and the result will be displayed based on the keyword or advance search.

To filter records by keyword

1. Place your cursor in the search bar (at the top of the grid) and enter a keyword search term.
2. Click the Search icon or press Enter to filter the records by keyword.

The grid refreshes to show the filtered list—columns that have the keyword filter applied to them. You can use the Clear icon in the search field to remove the entire entered keyword at once.

To filter records using advanced search

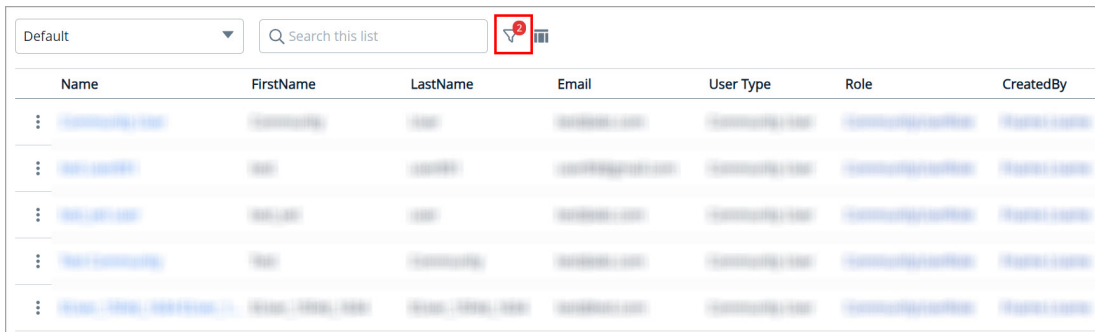
1. Click the **Advanced Search** () icon to open the filter dialog.
2. To specify the filter criteria, create simple or complex queries by entering values in the following fields:

Field Name	Description
Field	Select a field to be used in the filter criteria. The application initially pulls the list of fields from the search settings, and if no fields are enabled for search for the object, it displays queryable fields from the database.
Operator	Select an operator from the drop-down. The operator defines the relationship between the field and the value. The list of available operators varies depending on the data type of the chosen field.
Value	Enter the value of the field. The type of value field depends on the field selected.

3. To add another filter criteria, click **Add Criteria** and repeat step 2.
By default, two or more rows share an AND (Boolean operator) relationship.
4. To specify the filter logic between multiple rows, enable the **Logic** toggle.

- Specify your logic in the *Filter Logic* field. The supported filter logic operators are **AND** and **OR**. Use parentheses to set the order of operations.
For example, if you have five rows, you can create a filter logic such as (((1 AND 3) OR (2 AND 4)) AND 5).
- Click **Apply** to filter the list of records based on the criteria you defined.

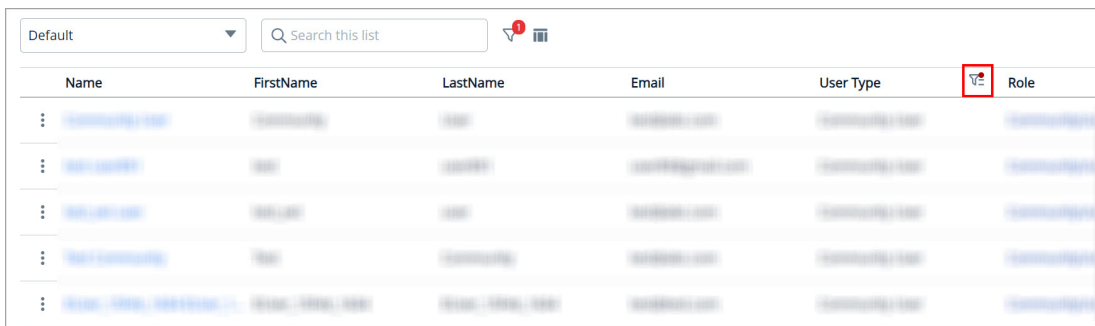
If you have already used a column filter, the application will show a warning message on the filter popup. Applying an advanced search will remove the column filter. You can see the total number of applied filters next to the Advanced Search icon.



To filter records by column

- Click or mouse hover on a column name and click the **Filter by** (🔍) icon to display the drop-down controls.
- Select an operator from the **Select an option** drop-down.
- Enter or select the value to filter the records by the specified column value.
- Click the **Apply** (✅) button.



If you have already used an advanced search filter, the application will show a warning message on the column filter popup. Applying a column filter will remove any applied advanced search filters and the column level filter will be added to the advanced search. A red dot will appear next to the filter icon for any applied column filter.



Exporting Records

The export feature enables you to export multiple selected records at once. This enables you to select one or multiple records and export them in a CSV or Excel file format.

Follow these steps to use the mass actions export feature to export selected records:

1. Navigate to the list of records.
2. Click the checkbox beside the "Feature Name" column. You can select one record, multiple records, or all the records in the list.
3. To export selected records, click the export icon ( ).
4. Choose the desired file format (CSV or Excel) for the export.

The selected records are exported and the file gets downloaded to your local storage.

Product Administration

This section provides information on managing products.

- [Managing the Products](#)
- [Managing Catalog](#)
- [Managing the Product Groups](#)
- [Managing the Constraint Rules](#)
- [Managing the Categories](#)
- [Managing the Option Groups](#)
- [Managing the Attributes and Attribute Groups](#)
- [Managing Product Attribute Rules and Attribute Value Matrices](#)
- [Managing Field Expressions](#)
- [Managing the Feature Sets](#)
- [Managing the Rollups](#)

Managing the Products

Products are the primary component of your CPQ system. Using CPQ, you can create individual products and product bundles. Once you've created products, you can associate attributes and options with them. Options are the additional accessory products to sell together with a product. Attributes allow you to associate product specifications such as color, size, or model.

You must associate the products with Categories to classify products into logical groups. You can define hierarchies in a category to further divide the products into smaller groups. On the Catalog page, CPQ displays the categories and hierarchy containing the products you associate with them.

Using feature sets, you can also configure CPQ to allow your users to compare the features of multiple products. By implementing feature sets, you allow your users to compare products and choose the product that best meets their requirements.

A Product in CPQ terminology is a product or service that can be set up to be sold on its own as a standalone product or option of other products. Products or services are set up as standalone, bundles, or options of other products. You can associate a product with a category or a price list. If you created an option product, you must first associate it with an option group.

- Standalone - This is an individual product that can be sold on its own.
- Bundle - Any product that has other products (options or bundles) associated with it.
- Options - This is a product that can be sold with a bundle product only through an option group.


Navigating the Product Administration Page

When you launch the CPQ Revenue Admin UI, the Products page is displayed. All the existing products are listed on this page along with their details. There are various functionalities available for you to manage the products.

Managing Views

You can manage column width, control which columns are displayed in the grid, freeze/pin a column range, or rearrange the column order. You can also filter the view of records in the grid by performing a keyword search, filtering the list by column value, or applying one or more advanced filters and filter logic. For more information, see [Managing the View Settings](#) and [Filtering the Records](#).

Actions available on this page

- Click **Add New** to create a new product.
- Click the ellipsis icon () next to the product name to edit, clone or Bundle Map an existing product.
- Click the product name link to open the Product Details page.
- Use the **Activate** switch to activate or deactivate a product.
- Export the selected products. For more information, see [Exporting Records](#).

This section provides information on managing products.

- [Creating a Product](#)
- [Editing a Product](#)
- [Cloning a Product](#)
- [Adding an Image to a Product](#)
- [Publishing the Product](#)
- [Associating Price Lists with a Product](#)
- [Creating Rules for a Product](#)
- [Associating Categories with a Product](#)
- [Associating Product Groups with a Product](#)
- [Associating Attribute Groups with a Product](#)
- [Associating Option Groups with a Product](#)
- [Associating Feature Sets with a Product](#)
- [Deleting a Product](#)

Creating a Product

You can create one or multiple products as required.

To create a product

1. Go to **ADMIN SETUP > Product Administration > Products**. A list of products is displayed.
2. Click **Create New**. The New Product pop-up is displayed.
3. Select **Create New Product** and click **Next**.
4. Select the type of product you want to create:
 - **Standalone**: This is an individual product that can be sold on its own.
 - **Bundle**: Any product that has other products (options or bundles) associated with it.
 - **Options**: This is a product that can be sold with a bundle product only through an option group. If you create an option product, you must first associate it with an option group.
5. Click **Next**.
6. Enter the following product information, as required.

Product Name	Enter a name for the product. This field is mandatory.

Product Description	Enter a description of the product. This description is displayed when the user clicks the product name on the catalog page.
Product Code	Enter a product code. The Product Code can be an internal code or a product number to identify the product within the org.
Product Family	Select a product family to categorize the products.
Product Type	Select a type of product. For example, Equipment, Service, and so on.
Uom	Select a unit of measurement.
Configuration Type	Select a configuration type for the product. Supported values are: <ul style="list-style-type: none"> • Standalone • Bundle • Option
External Key	Enter an external key.
Effective Date	Select the date from which the product is in effect. Effective date is not required as long as the product is active, but can be used for promotional rules, and more.
Expiration Date	Select the date until which the product is in effect.
Configurable	Turn this setting on to enable the user to configure a product to add options or attributes or both. The Configure button is the only option available on the Catalog page. When you turn this setting on, you must also turn on either Has Options , Has Attributes , or both. If this setting is turned off, the user can add the product to the cart directly or configure the product with attributes or options, or both.
Has Attributes	Turn this setting on to enable indicate that the product has attributes associated to it. During the quote creation process, the user can enter values for those attributes.

Has Options	Turn this setting on to enable indicate a product as a bundle that has options. You can associate options and option groups to the bundle. This field is available only for bundle products.
Active	Turn this setting on to make the product active. If this setting is turned off, the product is not displayed on the catalog page.

7. Click **Save**.

A product is created and saved.


You will be navigated to the Product Details page.

You can either activate or clone the product.

Editing a Product

You can also edit any product as required. This feature enables you to make the necessary changes to the product configuration when the requirement changes.

To edit a product


1. Go to **ADMIN SETUP > Product Administration > Products**.
2. Search for the product you want to edit.
3. Click the ellipsis icon  next to the product name and click **Edit**. The Product Details page is displayed.
4. Edit the required fields.
5. Click **Save**.

Cloning a Product

You can clone any product when you want to replicate the same product configurations for your new product.

To clone a product


1. Go to **ADMIN SETUP > Product Administration > Products**. A list of products is displayed.

2. Click the ellipsis icon  next to the product name and click **Clone**. The Product Details page is displayed.
3. Enter the following.
 - Product to Clone
 - New Product Name
 - External ID
 - Click the **Clone Entire Product** checkbox to add the following product details from the product you are cloning.
 - Category Details
 - Pricing, Attributes
 - Product Groups
 - Options
 - Rules (Constraint Rules) or select the individual from the above to be added to the cloned product.
4. Click **Save**.

Adding an Image to a Product

You can add a reference image to the product while configuring the product.


To add an image to a product

1. Go to **ADMIN SETUP > Product Administration > Products**.
2. Search for the product you want to add a picture.
3. Click the product name and click **Edit** on the details page or click the ellipsis icon  next to the product name and click **Edit**. The Product Details page is displayed.
4. Drag any image from your local storage to the image profile box or click the **Upload** button and double-click the image from your local storage that you want to upload.
5. Click **Save**.
6. You can click the preview button on the image to get a full view of the image.
7. You can delete the picture by hovering over the picture and clicking **Delete** in Edit mode. Click **Save**.

Publishing the Product

To publish a product

1. Go to **ADMIN SETUP > Product Administration > Products**.
2. Search for the product you want to edit.

3. Click the Product Name and you will be navigated to the Product Details page.
4. If the product is activated, click the ellipsis icon  next to the Deactivate button and click **Publish**.
5. You will get a prompt for successful publishing of the product.

Associating Price Lists with a Product



You can associate more than one price list with a product. When the sales representative selects the quote with the price list, CPQ displays all products that are associated with that price list are displayed on the catalog page.



Refer to the following topics for more information.

- [Associate a Price List with a Product](#)
- [Removing Associated Price Lists with a Product](#)

Associate a Price List with a Product

To associate a price list with a product

1. Go to **Admin Setup > Product Administration > Products** > Click on a Product name.
2. On the Product Details page, click the setup icon () in the Price List Items section to open the Associated Price List Items page. you can see all price lists available in the org under Available Price Lists.
3. In the **Search Price Lists** field, enter keywords to search the price list you want to associate with the product and click the search icon () or press Enter or Hover the mouse on the required price list and click + next to the price list name. The price list is associated with the product and is displayed in the Price List Items section (left-hand side).
4. Create a New Price List:
 - If the desired price list does not exist, click **Create New Price List** under the Available Price Lists page.
 - The New Price List page will be displayed.
 - Follow the steps in [Creating a Price List](#) to configure the new price list.
 - After configuring and saving the new price list, return to the Associated Price Lists page.
 - Search for the newly created price list as described in step 3 and associate it with the product.
5. Enter the following details for the price list item:

- a. From the **Charge Type** drop-down, select the required charge type for the product. Supported values are:
 - Standard Price
 - License Fee
 - Subscription Fee
 - Implementation Fee
 - Installation Fee
 - Adjustment
 - Service Fee
 - Rental Price
 - Sales Price
 - Usage Fee
 - Consulting Fee
 - b. In the **List Price** field, enter a list price for the product.
 - c. From the **Price Type** drop-down, select the price type. Supported values are:
 - One Time
 - Recurring
 - Usage
 - d. From the **Frequency** drop-down, select the frequency for the product. Supported values are:
 - Hourly
 - Daily
 - Monthly
 - Quarterly
 - Half Yearly
 - Yearly
 - Weekly
 - e. From the **Price Method** drop-down, select the price method for the product. Supported values are:
 - Per Unit
 - Flat Price
 - Percentage
 - Related Price
 - Tiered Price
 - f. Turn on the **Active** setting to activate the price list.
6. Click the ellipsis icon  next to a price list name and click **Add Charge Type**. A new charge type is added for the selected product. Multiple charge types for the same price list are together.
 7. Click the ellipsis icon  next to a product name and click **Charge Type Criteria**. For more information, see [Adding Charge Type Criteria to a Product](#).

8. Click **Save**.

The price list is associated with the product.



 **Charge Type**

If you click the charge symbol on PLI listings, it will display the charge-type criteria.

Removing Associated Price Lists with a Product

You can remove the price lists that are associated with a product when the product is no longer a part of that price list or the requirements change.

To remove the association of a price list with a product

1. Go to ADMIN SETUP > Product Administration > Products. The Products page is displayed.
2. Click the required product name link to open the Products details page.
3. Click the setup icon  in the Price Lists section. The Price Lists page is displayed.
4. Click the Price List Items tab.
5. In the Price List Items section, search for the price list item you want to delete.
6. Click the ellipsis icon  next to a price list name and click **Remove**.
 - If there are any unsaved changes, the Editing item(s) in Price List Items pop-up is displayed. Click **Discard Changes**. A pop-up is displayed prompting you to confirm deletion. Click **Confirm**.
 - If there are no unsaved changes, a pop-up is displayed prompting you to confirm deletion. Click **Confirm**.

Creating Rules for a Product

You can use Product Rules to regulate the selection of the products by the Sales rep on the Catalog page. When the Catalog exceeds a simple number of products, it can be difficult for the Sales rep to find their desired product based on the specific requirements of the company. Product Rules can guide the Sales rep to follow what is best and compliant for the company.

You can configure the following types of rules:

- **Constraint Rules:** Configuration rules used to conditionally include, exclude, recommend, replace, or validate a product or set of products based on other products or set of products added to the cart.

- [Attribute-based Configuration](#): Helps you modify the product configuration on your cart based on the selection of product attributes using Product Attribute Rules and Attribute Value Matix.


This section describes the following topics.

- [Creating Constraint Rules for a Product](#)
- [Associating Attribute Rules with a Product](#)

Creating Constraint Rules for a Product

You can create more than one constraint rules for a product.

To create a constraint rule for a product

1. Go to Admin Setup > Product Administration > Products > Click on a Product name.
2. On the Product Details page, click the setup icon  in the Constraint Rule section. The Constraint Rules page is displayed.
3. Click **Create New**. The New Constraint Rule pop-up is displayed.
4. Enter the following details:

Field	Description
Rule Name	Enter a name for the constraint rule. It is populated based on the product name.
Rule Type	Select a rule type. Supported values are: <ul style="list-style-type: none"> • Inclusion: Enforces selection of certain products as specified by the product scope specification or criteria specification in the inclusion rule. • Exclusion: Enforces exclusion of certain products from the shopping cart. • Validation: Displays the error message when the criteria conditions are fulfilled. • Recommendation: Product recommendations are displayed when the condition is fulfilled. • Replacement: Product replacements are suggested when the condition is fulfilled.
Condition Scope	The condition scope for the constraint rule is auto-populated and you cannot change it as the field is disabled.
Condition Item	The condition item for the constraint rule is auto-populated and you cannot change it as the field is disabled.

Field	Description
Match In	<p>Select an option where the condition match must happen. Supported values are:</p> <ul style="list-style-type: none"> • MatchInOptions: Selecting this means the condition is fulfilled only when the condition products are in the option line items of the shopping cart. • MatchInPrimaryLines: Selecting this means the condition is fulfilled only when the condition products are among the primary lines (bundle or standalone) of the shopping cart.
Action Intent	<p>Select the intent of the action. Supported values are:</p> <ul style="list-style-type: none"> • Auto Include: Adds selected products automatically. When the number of products selected by the rule action is more than the number mentioned in the Match Rule condition, auto-inclusion of products is not triggered. A message is displayed from the rule action instead. Note: Auto Include will not apply when the match rule value is Include All. • Prompt: Displays a message with choices of products that you can select or remove. • Show Message: Displays a message. • Check on Finalization: Applies rule action on finalization of the shopping cart. This action intent does not enable the recommendation rule. • Disable Selection: Disables selection of excluded products. • Hide: Hides the selection of excluded products.

Field	Description
Action Scope	<p>Select the action scope. Supported values are:</p> <ul style="list-style-type: none"> • Product: In the Product field, click to select a product to be included or excluded. You search the product using product name or code. • Product Family: In the Product Family field, enter a product family. One or more of the products from the product family will be included or excluded based on rule type and match rule specifications. • Product Group: In the Product Group field, enter a product group. One or more of the products from the product group will be included or excluded based on rule type and match rule specifications. • Action Criteria:
Action Item	Enter a keyword to search the action item. From the displayed search result, select an action item.

5. Click **Save**. The constraint rules details page is displayed.
6. On the Details tab, enter the following details:

Field	Description
Rule Name	Enter a name for the constraint rule.
Description	Description for the constraint rule.
Effective Date	Select the date from which the constraint rule is in effect.
Expiration Date	Select the date until which the constraint rule is valid.
Is Active	Turn this setting on to indicate whether the constraint rule is active.
Is Bundle Context	Turn this setting on to indicate whether the constraint is evaluated within a bundle.




7. On the Conditions & Actions tab:
 - a. Create a constraint rule condition.
 - b. Create a constraint rule action.
8. Click **Save**.

A constraint rule for the product is created and saved.

Associating Attribute Rules with a Product

You can associate more than one attribute rule with a product.

To associate attribute rule with a product

1. Go to Admin Setup > Product Administration > Products > Click on a Product name.
2. On the Product Details page, click the setup icon  in the Attribute Rules section. The Attribute Rules page is displayed.
3. Click the **Create New** drop-down button:
 - a. Click **Product Attribute Rule**. You can create a PAR. For more information, see [Creating a Product Attribute Rule](#).
 - b. Click **Attribute Value Matrix**. You can create an AVM. For more information, see [Creating an Attribute Value Matrix](#).
4. On the Product Attribute Rules tab:
 - a. In the **Search this list** field, enter keywords to search the PAR associated with the product.
 - b. Use the **Active** switch to activate or deactivate a PAR.
 - c. Click the PAR name link to open the PAR details page.
 - d. Click the ellipsis icon  next to the PAR name and click **Delete**. The Delete Attribute Rule pop-up is displayed. Click **Confirm**.
5. On the Attribute Value Matrix tab:
 - a. In the **Search this list** field, enter keywords to search the AVM associated with the product.
 - b. Use the **Active** switch to activate or deactivate an AVM.
 - c. Click the AVM name link to open the AVM details page.
 - d. Click the ellipsis icon  next to the AVM name and click **Delete**. The Delete Attribute Matrix pop-up is displayed. Click **Confirm**.

Associating Categories with a Product

Categories are high-level logical groupings of products, affecting the way the Sales representatives sees them for selection on the Product Catalog. A category can be created for browsing products in the Catalog page or they can be created for creating options groups for a Bundle product. Products are associated to a category through a category hierarchy.


Refer to the following topic for more information.



- [Associating a Category with a Product](#)


Associating a Category with a Product

You can associate more than one category with a product.

To associate categories for a product

1. Go to Admin Setup > Product Administration > Products > Click on a Product name.
2. On the Product Details page, click the setup icon  in the Categories section. The Categories page is displayed. Under Available Categories, you can see all categories available in the org.
3. In the **Search Categories** field, enter keywords to search the category you want to associate with the product.
4. Hover the mouse on the required category and click + next to the category name. The category is associated to the product and is displayed in the Associated Categories section (right-hand side).




 Hover the mouse on a parent category and click the  icon next to the category name to display the category hierarchy.

5. Create a New Category:
 - If the desired category does not exist, click **Create New Category** under the Available Categories page.
 - The New Category page will be displayed.
 - Follow the steps in [Creating a Category](#) to configure the new price list.
 - After configuring and saving the new price list, return to the Associated Price Lists page.
 - Search for the newly created price list as described in step 3 and associate it with the product.
6. To delete an associated category from the product:
 - a. Hover the mouse on the required category under the Associated Categories section (right-hand side) and click the delete icon  for the category name. The Remove Category pop-up is displayed prompting you to confirm deletion.
 - b. Click **Confirm**.
7. Under the Associated Categories section (right-hand side):
 - a. Click the category name link. The category details pop-up is displayed.
 - b. Click **Close**.

Associating Product Groups with a Product

You can associate more than one product group with a product.

To associate a product group with a product


1. Go to Admin Setup > Product Administration > Products > Click on a Product name.
2. On the Product Details page, click the setup icon  in the Product Groups section. The Product Groups page is displayed. Under Available Product Groups, you can see all product groups available in the org.
3. In the **Search Product Group** field, enter keywords to search the product group you want to associate with the product and click the search icon  or press Enter.
4. Hover the mouse on the required product group and click + next to the product group name. The product group is associated with the product and is displayed in the Associated Product Groups section (right-hand side).
5. Create a Product Group:
 - If the desired product group does not exist, click **Create New Product Group** under the Available Product Groups page.
 - The New Product Group page will be displayed.
 - Follow the steps in [Creating a Product Group](#) to configure the new product group.
 - After configuring and saving the new product group, return to the Associated Product Groups page.
 - Search for the newly created product group as described in step 3 and associate it with the product.
6. To delete an associated product group from the product:
 - a. Hover the mouse on the required product group under the Associated Product Groups section (right-hand side) and click the delete icon  for the product group name. A pop-up is displayed prompting you to confirm deletion.
 - b. Click **Confirm**.
7. Under the Associated Product Groups section (right-hand side):
 - a. Click the product group name link. The product group details pop-up is displayed.
 - b. Click **Close**.



Associating Attribute Groups with a Product


You can associate more than one attribute group with a product.

To associate an attribute group with a product

1. Go to Admin Setup > Product Administration > Products > Click on a Product name.

2. On the Product Details page, click the setup icon  in the Attribute Groups section. The Attribute Groups page is displayed. Under Available Attribute Groups, you can see all attribute groups available in the org.
3. In the **Search Attribute Groups** field, enter keywords to search the attribute group you want to associate with the product.
4. Hover the mouse on the required attribute group and click + next to the attribute group name. The attribute group is associated to the product and is displayed in the Associated Attribute Groups section (right-hand side).


 You can reorder the Attributes by moving the order  icon up or down.


5. Create a New Attribute Group:
 - If the desired attribute group does not exist, click **Create New Attribute Group** under the Available Attribute Groups page.
 - The New attribute group page will be displayed.
 - Follow the steps in [Creating an Attribute Group](#) to configure the new attribute group.
 - After configuring and saving the new attribute group, return to the Associated Attribute Groups page.
 - Search for the newly created attribute group as described in step 3 and associate it with the product.
6. To delete an associated attribute group from the product:
 - a. Hover the mouse on the required attribute group under the Associated Attribute Groups section (right-hand side) and click the delete icon  for the attribute group name. The Remove Attribute Group pop-up is displayed prompting you to confirm deletion.
 - b. Click **Confirm**.
7. Under the Associated Attribute Groups section (right-hand side) and click the attribute group name link. The attribute group details page is displayed. If the attribute group has attributes inside, this page displays those attributes.

Associating Option Groups with a Product



You can associate more than one option groups with a product. You can add a root option group to a bundle product.

To associate option group with a product


1. Go to Admin Setup > Product Administration > Products > Click on a Product name.
2. On the Product Details page, click the setup icon  in the Option Groups section. The Option Groups page is displayed.

3. Click **Add Option Group**. The Add Option Group to Product pop-up will be displayed where you can see all option groups available in the org.
4. In the **Search Option Groups** field, enter keywords to search the option group you want to associate with the product and click the search icon  or press Enter.
5. Select the checkbox beside Option Group name. The option group is associated to the product. You can associate one, or more option groups to the product by selecting multiple checkbox.
6. Export the Associated Option Groups

The mass action feature allows you to export the selected coupons in one instance.

- Click the checkbox beside Option Group Name column. You can select one option group, multiple option groups, or all the option groups.
- Click the export ( ) icon to export the selected option groups as CSV or Excel file format.

The file gets downloaded to your local storage.

7. To remove an associated option group from the product:
 - a. Click the ellipsis () icon for the required option group and click the **Remove**. The Remove Option Group pop-up is displayed prompting you to confirm deletion.
 - b. Click **Confirm**.
8. Under the Add Option Group to Product pop-up:
 - a. Click the option group name link. The option group details page is displayed.
9. To Configure Option Groups:
 - a. Click the option group name tab. The Configure Option Group detail page appears.
 - b. Enter the following option group information, as required.

Option	Description
Min Options	Enter the minimum options that needs to be required for the option group in order to associate it to the product.
Max Options	Enter the maximum options that needs to be required for the option group in order to associate it to the product.
Min Total Quantity	Enter the expression for minimum total quantity using the field and function feature provided.
Max Total Quantity	Enter the expression for maximum total quantity using the field and function feature provided.

Option	Description
Modifiable Type	Select whether you need a Variable or a Fixed value.
Is Hidden	Toggle on of off accordingly.
Is Picklist	Toggle on if the options are picklist.

10. Click **Save**.



Sequencing the option groups

- Administrator can define and save the sequence/order of option groups and product option groups.
- Reordering is possible by moving groups up or down within the same hierarchy level.
- Adding new groups appends them to the lowest level with sequence numbers incrementing accordingly.
- Administrator can modify the sequence of an option group, then the sequence order on the config page is updated automatically. The Option group sequence only affect the sequence for the groups within their respective bundle levels.

Associating Feature Sets with a Product


You can associate more than one feature set with a product.


To associate feature set with a product

1. Go to Admin Setup > Product Administration > Products > Click on a Product name.
2. On the Product Details page in the Feature Sets section, click the setup icon () to open the Feature Sets page. You can see all Feature Sets available in the org under Available Feature Sets.
3. In the **Search Feature Sets** field, enter keywords to search the Feature Sets you want to associate with the product and click the search icon () or press Enter.
4. Hover the mouse on the required Feature Sets and click (+) next to the Feature Sets name.
5. Create a Feature Set:

- If the desired feature set does not exist, click **Create New Feature Set** under the Available Feature Sets page.
 - The New Feature Set page will be displayed.
 - Follow the steps in [Creating a Feature Set](#) to configure the new feature set.
 - After configuring and saving the new feature set, return to the Associated Feature Sets page.
 - Search for the newly created feature set as described in step 3 and associate it with the product.
6. The Feature Set is associated with the product and is displayed in the Associated Product Groups section.



You can reorder the feature sets by moving the order  icon up or down.

7. To delete an associated product group from the product:
- Click the delete icon () next to the Feature Set name.

Deleting a Product

You can delete products that are no longer required for your business requirements.

To delete a product

The delete action cannot be performed on the UI. The delete action can only be triggered via API to the product administrator.

Managing Catalog

The **Catalog Page** allows you to create categories and associate them with the products to display when you browse and search for products to add to a quote. It enhances the efficiency and accuracy of the quoting process by providing a user-friendly interface for product selection and configuration.

This catalog page allows you to create the following categories.

- Main Category
- Sub Category


Navigating the Catalog Page

When you launch the Catalogs page on the UI, all the existing catalogs are listed on this page along with their details. There are various functionalities available for you to manage the catalogs.

Managing Views

You can manage column width, control which columns are displayed in the grid, freeze/pin a column range, or rearrange the column order. You can also filter the view of records in the grid by performing a keyword search, filtering the list by column value, or applying one or more advanced filters and filter logic. For more information, see [Managing the View Settings](#) and [Filtering the Records](#).

Actions available on this page

- Click **Create New > Main Category** to create a new main category.
- Click **Create New > Sub Category** to create a new sub category.
- Click the ellipsis icon () next to the catalog name to delete an existing rule.
- Export the selected catalogs. For more information, see [Exporting Records](#).

The following sections describe various catalog operations for managing catalog.

- [Creating a Main Category](#)
- [Creating a Sub Category](#)
- [Associating Price Lists to the Categories](#)
- [Associating Products with Categories](#)
- [Navigating the Catalog Page](#)
- [Configuring Categories](#)
- [Deleting a Category](#)

Creating a Main Category

You can create multiple main categories and associate them based on the nature of the product. A list of associated products is displayed when you select the category on the catalog page.

To create a main category

1. Go to the Catalog page.

2. Click **Create New** to open a new category page. or
Select the main category type from the dropdown next to the **Create New** button.
3. Enter the following details.

Field Name	Description
Category Name	Enter the name of the new category
Label	The system automatically fills this field based on the name you entered in the category name.
Description	Enter the description for the new category.
Search Filter Fields	Select the fields you want to use as search filters on the catalog page. The selected fields are visible under the 'Refine Your Search 'section while adding the products under this category on the catalog page.
Default Search Category	To set the category as default on the catalog page.
Expand by default	To display the sub-categories expanded by default.
Include in Total View	Turn on this setting to include the value of the products in this category in total view.
Hide All Search Filters	Turn on this setting to hide all search filters.

4. Click **Save**.

To create a sub-category, see [Configuring Sub Categories](#).

Creating a Sub Category

You can create standalone sub-category or under the main category based on your requirement.

To create a sub-category

1. Go to the Catalog page.

2. Click the dropdown next to the **Create New** button and select the **Sub Category** to open the **Choose a Parent Category** popup window.
3. Select the main category by clicking the check box next to the required categories.
4. Enter the following details.

Field Name	Description
Category Name	Enter the name of the new category
Label	The system automatically fills this field based on the name you entered in the category name.
Description	Enter the description for the new category.
Search Filter Fields	Select the fields you want to use as search filters on the catalog page.
Default Search Category	To set the category as default on the catalog page.
Expand by default	To display the sub-categories expanded by default.
Include in Total View	Turn on this setting to include the value of the products in this category in total view.
Hide All Search Filters	Turn on this setting to hide all search filters.


5. Click **Save**.

To include sub-categories from existing

1. Go to the Catalog page.
2. Click the desired category name page to open the category details page.
3. Click the vertical ellipsis (⋮) icon and select **Add Sub Category from Existing**.
4. In the Add Category window, select the categories by clicking the checkboxes next to the required categories to import into the new category.
5. Click **Add**.

After creating sub-categories, you can

1. Use the sequence (⋮) icon to reorder the sub-category up and down in the category hierarchy.

2. To delete an sub-category from the list:
 - a. Click the ellipsis icon  of the required sub-category.
 - b. Click **Delete**.


Associating Price Lists to the Categories

You can associate more than one price list with a category.

To associate a price list with categories

1. Go to the Catalog page.
2. Click the desired category name page to open the category details page.
3. Select the category from the list and click the **Price Lists** in the right panel.
4. Click **Add Price List** to open **Add Price List to Category** popup window.
5. Select the required price lists by clicking the check boxes next to the price list.
6. Click **Add**.

Associating Products with Categories

 You can not create a sub-category once you associate or add products to the main category.

To associate products with the main category

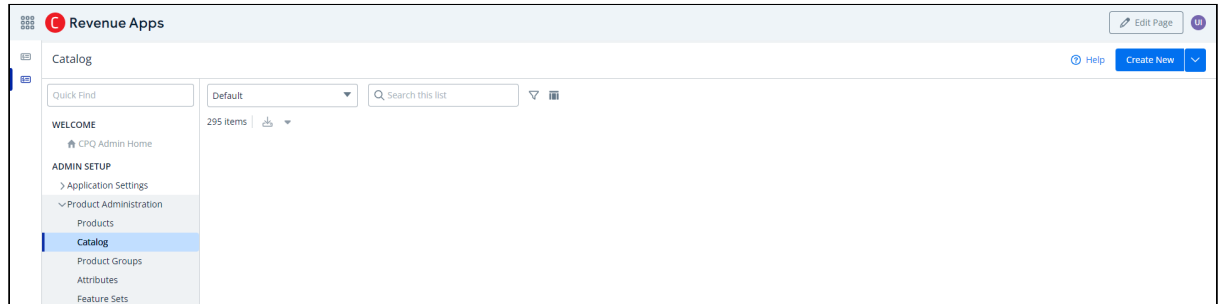
1. Go to the Catalog page.
2. Click the desired category name page to open the category details page.
3. Select the category from the list.
4. From the right panel, click the **Products**.
5. Click **Add Price List** to open the **Add Products to Category** popup window.
6. Select the required price lists by clicking the check boxes next to the products.
7. Click **Add**.

Navigating the Catalog Page

To navigate the catalog page

1. Login to the Conga Platform.

2. Click the **Revenue Apps** tile to launch the Revenue Apps page. By default, the proposals page is selected.
3. Click **Revenue Admin** in the left pane.
4. Go to Admin Setup > Product Administration > Catalog to open the catalog page.



Configuring Categories

The **Catalog Page** allows you to browse and search for products to add to a quote. It enhances the efficiency and accuracy of the quoting process by providing a user-friendly interface for product selection and configuration. This catalog page allows you to create the following categories.




- Main Category
- Sub Category

Refer to the following topics for more information.

Deleting a Category

You can remove category that no longer required.

To delete a category

1. Go to ADMIN SETUP> Product Administration > Catalog. The Catalog page is displayed.
2. Search for the category, and do one of the following:
 - To delete a single category, click the ellipsis icon () next to the attribute name, and click **Delete**.
 - To delete multiple categories, click the checkboxes next to the name column, and click the () icon.
 - To delete all categories, click the checkbox in the header row next to the name column, and click the () icon.
3. Click **Confirm**.

Managing the Product Groups

You can create a logical grouping of one or more product records using product groups. You can create combinations of products with similar characteristics or qualities for use in a price rule. A product group can consist of products from different product families.

To configure a product group, you must create a product group and add products as members of the group. You can add products as members of a group. You can also add products of different product families as a member of a product group.

Navigating the Product Groups Page

All the existing product groups along with their details are displayed on the product groups page. The following functionalities are available for you to manage the product groups.

Managing Views

You can manage column width, control which columns are displayed in the grid, freeze/pin a column range, or rearrange the column order. You can also filter the view of records in the grid by performing a keyword search, filtering the list by column value, or applying one or more advanced filters and filter logic. For more information, see [Managing the View Settings](#) and [Filtering the Records](#).

Actions available on this page

- Click **Create New** to create new product groups.
- Click the More (⋮) button to delete an existing product group.
- Click the product group name link to view the product group details.
- Export the selected catalogs. For more information, see [Exporting Records](#).

The following sections describe various product group operations for managing product groups.

- [Creating a Product Group](#)
- [Editing a Product Group](#)
- [Associating Products with a Product Group](#)
- [Creating Constraint Rules for a Product Group](#)
- [Using the Where used Option for a Product Group](#)
- [Associating Attribute Rules with a Product Group](#)
- [Deleting a Product Group](#)

- [Configuring Product Groups](#)

Creating a Product Group

You can create multiple product groups as required.

To create a product group


1. Go to **ADMIN SETUP > Product Administration > Product Groups**.
2. Click **Create New**. The New Product Group pop-up is displayed.
3. Enter the following details:
 - **Group Name**: Name for the product group.
 - **Description**: Description for the product group.
4. Click **Create**. The Product Group details page is displayed with all information you provided.
5. On the Details tab, update the details if required and click **Save**.

A product group is created and saved. You can associate products and constraint rules with them.

Editing a Product Group

You can edit a product group as required when the requirement changes.

To edit a product group

1. Go to **ADMIN SETUP > Product Administration > Product Groups**.
2. Search for the product group you want to update.
3. Click the ellipsis icon  next to the product group name and click **Edit**. The Product Group details page is displayed.
4. On the Details tab, update the required fields.
5. Click **Save**.
6. On the Associated Products tab, associate products with the product group.
7. On the Constraint Rules tab, create constraint rules for the product group.

Associating Products with a Product Group

1. Go to **ADMIN SETUP > Product Administration > Product Groups**.
2. Search for the product group you want to update.
3. Click the product group name link to open the Product Group details page.
4. Go to the Associated Products tab.

5. In the Search Products box, enter keywords to search the product you want to associate with the product group.
6. Hover the mouse on a the required product and click + next to the product name. The product is associated to the product group and is displayed under the Associated Products section.
7. To delete an associated product from the product group:
 - a. Under the Associated Products section, enter the name of the product that you want to search in the **Search the list** box and press **Enter**. Products that match the search are displayed.
 - b. Hover the mouse on the product you want to disassociate and click the x icon. The Remove Product pop-up is displayed.
 - c. Click **Confirm**.

Creating Constraint Rules for a Product Group

You can create more than one constraint rules for a product group.

1. Go to **ADMIN SETUP > Product Administration > Product Groups**.
2. Search for the product group you want to update.
3. Click the product group name link to open the Product Group details page.
4. Go to the Constraint Rules tab.
5. Click **Create New**. The New Constraint Rule pop-up is displayed.
6. Enter the following details:

Field	Description
Rule Name	Enter a name for the constraint rule. It is populated based on the product group name.
Rule Type	Select a rule type. Supported values are: <ul style="list-style-type: none"> • Inclusion: Enforces selection of certain products as specified by the product scope specification or criteria specification in the inclusion rule. • Exclusion: Enforces exclusion of certain products from the shopping cart. • Validation: Displays the error message when the criteria conditions are fulfilled. • Recommendation: Product recommendations are displayed when the condition is fulfilled. • Replacement: Product replacements are suggested when the condition is fulfilled.

Field	Description
Condition Scope	The condition scope for the constraint rule is auto-populated and you cannot change it as the field is disabled.
Condition Item	The condition item for the constraint rule is auto-populated and you cannot change it as the field is disabled.
Match In	<p>Select an option where the condition match must happen. Supported values are:</p> <ul style="list-style-type: none"> • MatchInOptions: Selecting this means the condition is fulfilled only when the condition products are in the option line items of the shopping cart. • MatchInPrimaryLines: Selecting this means the condition is fulfilled only when the condition products are among the primary lines (bundle or standalone) of the shopping cart.
Action Intent	<p>Select the intent of the action. Supported values are:</p> <ul style="list-style-type: none"> • Auto Include: Adds selected products automatically. When the number of products selected by the rule action is more than the number mentioned in the Match Rule condition, auto-inclusion of products is not triggered. A message is displayed from the rule action instead. Note: Auto Include will not apply when the match rule value is Include All. • Prompt: Displays a message with choices of products that you can select or remove. • Show Message: Displays a message. • Check on Finalization: Applies rule action on finalization of the shopping cart. • Disable Selection: Disables selection of excluded products. • Hide: Hides the selection of excluded products.

Field	Description
Action Scope	<p>Select the action scope. Supported values are:</p> <ul style="list-style-type: none"> • Product: In the Product field, click to select a product to be included or excluded. You search the product using product name or code. • Product Family: In the Product Family field, enter a product family. One or more of the products from the product family will be included or excluded based on rule type and match rule specifications. • Product Group: In the Product Group field, enter a product group. One or more of the products from the product group will be included or excluded based on rule type and match rule specifications. • Action Criteria:
Action Item	Enter a keyword to search the action item. From the displayed search result, select an action item.

7. Click **Save**. The constraint rules details page is displayed.
8. On the Details tab, enter the following details:

Field	Description
Rule Name	Enter a name for the constraint rule.
Description	Description for the constraint rule.
Effective Date	Select the date from which the constraint rule is in effect.
Expiration Date	Select the date until which the constraint rule is valid.
Is Active	Turn this setting on to indicate whether the constraint rule is active.
Is Bundle Context	Turn this setting on to indicate whether the constraint is evaluated within a bundle.

9. On the Conditions & Actions tab:
 - a. Create a constraint rule condition.
 - b. Create a constraint rule action.

10. Click **Save**.

A constraint rule for the product group is created and saved.

Using the Where used Option for a Product Group

You can view Field Expressions, Rollups, and Price Rules that are associated with the Product Group in the pop-up. The information displayed in this panel is in read-only format.

To use the Where used Option



1. Go to ADMIN SETUP > Product Administration > Product Groups. The Product Groups page is displayed.
2. Search and click on the product group name to view the details.
3. Click the **Where used** button in the top right corner.
4. In the Used Locations pop-up, do the following:
 - Review the number of field expressions, rollups, and price rules that are associated with the product group.
 - Click the **Field Expressions** tab to see the list of field expressions where the product group is used as a scope.
 - Click the **Rollups** tab to see all the rollups that are associated with the product group.
 - Click the **Price Rules** tab to see the list of all Price Rules where the product group has been referenced.
 - Click on the name of a Field Expression, Rollup, or price rule to view additional details in a new tab.
 - Search and sort field expressions, rollups, and price rules.
5. Click **Close**.

For more information, see [Managing Field Expressions](#), [Managing the Rollups](#), and [Managing Price Rulesets](#).

Associating Attribute Rules with a Product Group

You can associate more than one attribute rules with a product.




1. On the Product Group list page, select the product group to which you want to associate the Attribute rule.
2. Click the Attribute Rules tab. The Attribute Rules page is displayed.
3. Click the **Create New** drop-down button:
 - a. Click **Product Attribute Rule**. You can create a PAR. For more information, see [Creating a PAR](#).

- b. Click **Attribute Value Matrix**. You can create an AVM. For more information, see [Creating an AVM](#).
4. On the Product Attribute Rules tab:
 - a. In the **Search this list** field, enter keywords to search the PAR associated with the product.
 - b. Use the **Active** switch to activate or deactivate a PAR.
 - c. Click the PAR name link to open the PAR details page.
 - d. Click the ellipsis icon  next to the PAR name and click **Delete**. The Delete Attribute Rule pop-up is displayed. Click **Confirm**.
5. On the Attribute Value Matrix tab:
 - a. In the **Search this list** field, enter keywords to search the AVM associated with the product.
 - b. Use the **Active** switch to activate or deactivate an AVM.
 - c. Click the AVM name link to open the AVM details page.
 - d. Click the ellipsis icon  next to the AVM name and click **Delete**. The Delete Attribute Matrix pop-up is displayed. Click **Confirm**.

Deleting a Product Group

You can delete a product group that is no longer required.

To delete a product group

1. Go to ADMIN SETUP > Product Administration > Product Groups.
2. Search for the product group, and do one of the following:
 - To delete a single product group, click the ellipsis icon () next to the attribute name, and click **Delete**.
 - To delete multiple product groups, click the checkboxes next to the name column, and click the () icon.
 - To delete all product groups, click the checkbox in the header row next to the name column, and click the () icon.
3. Click **Confirm**.

Configuring Product Groups

This section provides information on configuring product groups.


Refer to the following topics for more information.

Managing the Constraint Rules

Constraint Rules are configuration rules used to conditionally include, exclude, recommend, replace, or validate a product or set of products based on other products or set of products added to the cart. For example, when Product A is added to the cart, Product B can be automatically added based on an auto-inclusion type rule. Similarly, when Product B is added to the cart, the sales rep can be prevented from adding Product C.

The constraint rule consists of three associated Objects:

- **Constraint Rule Object:** Header level object that links the condition with the action. There are only three significant properties in this object, the active flag, action association, and condition association. To configure a constraint rule, you must first create a constraint rule header. You can create a constraint rule for a product or product group.
- **Constraint Rule Condition:** Captures the condition that triggers the rule.
- **Constraint Rule Action:** Captures the rule action that is applied to the cart when the rule condition is satisfied.

 The Constraint Rule Execution mode is mutually exclusive, and only one value may be selected via the global system property. Mixing different modes through custom code customization is strongly discouraged, as it can result in unpredictable behavior. Please ensure adherence to this guidance for consistent and reliable system performance.



Navigating the Constraint Rules Page

When you launch the Constraint Rules page on the UI, all the existing constraint rules are listed on this page along with their details. There are various functionalities available for you to manage the constraint rules.

Managing Views

You can manage column width, control which columns are displayed in the grid, freeze/pin a column range, or rearrange the column order. You can also filter the view of records in the grid by performing a keyword search, filtering the list by column value, or applying one or more advanced filters and filter logic. For more information, see [Managing the View Settings](#) and [Filtering the Records](#).

Actions available on this page

- Click the ellipsis icon  below the Edit Page button to create a new constraint rule.
- Click the constraint rule name link to open the constraint rule details page and edit the constraint rule details.
- Click the ellipsis icon  next to the constraint rule name to delete a constraint rule.
- At the top of the page, you can see different rule types along with a total count of constraint rules under that rule type. To view the constraint rule based on rule type, click the specific Rule Type on top of the page.
- Use the **Active** switch to activate or deactivate a constraint rule.
- Export the selected constraint rules. For more information, see [Exporting Records](#).

Items per page

At the bottom of the page, you can see the total count of constraint rules available. You can control the number of constraint rules to be displayed on each page. You can select the number of constraint rules from a predefined list. You cannot configure this list. By default, you see 20 records on each page.

By default, you can sort 10, 20, 30, 50, and 100 constraint rules per page using the **Rows per page** drop-down. This feature works in association with the search and filter functions to display search records per page. You can use the < and > buttons to move to the next or the previous pages. You can also jump to a certain page using the page search component.


This section provides information on managing constraint rules.


- [Creating a Constraint Rule](#)
- [Configuring a Constraint Rule Using the Advanced Rule Setup](#)
- [Deleting a Constraint Rule](#)

Creating a Constraint Rule

This section provides information on creating a constraint rule.

1. Go to ADMIN SETUP > Product Administration > Constraint Rules. The Constraint Rules page is displayed.
2. Click **Create New** button. If you want to create a specific type of rule, select the required rule type from the dropdown beside Create New button.
3. Enter the following details:

Field	Description
Rule Name	CPQ populates a constraint rule name based on the product name. Enter a different name for the constraint rule if required.
Rule Type	<p>Select a rule type. Supported values are:</p> <ul style="list-style-type: none"> • Inclusion: Enforces selection of certain products as specified by the product scope specification or criteria specification in the inclusion rule. • Exclusion: Enforces exclusion of certain products from the shopping cart. • Validation: Displays the error message when the criteria conditions are fulfilled. • Recommendation: Product recommendations are displayed when the condition is fulfilled. • Replacement: Product replacements are suggested when the condition is fulfilled. <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p> If you create a specific type of rule directly from the drop-down arrow next to the Create New button, this field is populated with your selection. However, you can change the selection if required.</p> </div>

Field	Description
Condition Scope	<p>Select the condition scope. This defines what must be present in the shopping cart to fulfil the condition.</p> <ul style="list-style-type: none"> • Product: This implies that the product must be present in the shopping cart to fulfil the condition. • Product Family: This implies that one or more products from the specified product family must be present in the shopping cart to fulfil the condition. The number of products that should be present depends on the Match Rule. • Product Group: This implies that one or more products from the specified product group must be present in the shopping cart to fulfil the condition. The number of products that should be present depends on the Match Rule. • Product Option Group: This implies that one or more products from the specified product option group must be present in the shopping cart to fulfil the condition. The number of products that must be present depends on the Match Rule.
Condition Item	<p>Search and select a condition item based on your selection in Condition Scope.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> You must enter minimum three characters to perform search.</p> </div>
Match In	<p>Select one or multiple options where the condition match must happen. Supported values are:</p> <ul style="list-style-type: none"> • Match In Options: Selecting this means the condition is fulfilled only when the condition products are in the option line items of the shopping cart. • Match In Primary Lines: Selecting this means the condition is fulfilled only when the condition products are among the primary lines (bundle or standalone) of the shopping cart.

Field	Description												
Action Intent	<p>Select the intent of the action. Supported values are:</p> <ul style="list-style-type: none"> • Auto Include: Adds selected products automatically. When the number of products selected by the rule action is more than the number mentioned in the Match Rule condition, auto-inclusion of products is not triggered. A message is displayed from the rule action instead. Note: Auto Include is not applicable when the Match Rule value is Include All. • Prompt: Displays a message with choices of products that you can select or remove. • Show Message: Displays a message. • Check on Finalization: Applies rule action on finalization of the shopping cart. • Disable Selection: Disables selection of excluded products. • Hide: Hides the selection of excluded products. <table border="1" data-bbox="643 1025 1425 1975"> <thead> <tr> <th data-bbox="643 1025 978 1160">Rule Type Selected</th> <th data-bbox="978 1025 1425 1160">Options Available on the Action Intent Drop-Down</th> </tr> </thead> <tbody> <tr> <td data-bbox="643 1160 978 1346">Inclusion</td> <td data-bbox="978 1160 1425 1346"> <ul style="list-style-type: none"> • Auto Include • Prompt • Show Message • Check on Finalization </td> </tr> <tr> <td data-bbox="643 1346 978 1574">Exclusion</td> <td data-bbox="978 1346 1425 1574"> <ul style="list-style-type: none"> • Prompt • Show Message • Check on Finalization • Disable Selection • Hide </td> </tr> <tr> <td data-bbox="643 1574 978 1682">Validation</td> <td data-bbox="978 1574 1425 1682"> <ul style="list-style-type: none"> • Show Message • Check on Finalization </td> </tr> <tr> <td data-bbox="643 1682 978 1832">Recommendation</td> <td data-bbox="978 1682 1425 1832"> <ul style="list-style-type: none"> • Prompt • Show Message • Check on Finalization </td> </tr> <tr> <td data-bbox="643 1832 978 1975">Replacement</td> <td data-bbox="978 1832 1425 1975"> <ul style="list-style-type: none"> • Prompt • Show Message • Check on Finalization </td> </tr> </tbody> </table>	Rule Type Selected	Options Available on the Action Intent Drop-Down	Inclusion	<ul style="list-style-type: none"> • Auto Include • Prompt • Show Message • Check on Finalization 	Exclusion	<ul style="list-style-type: none"> • Prompt • Show Message • Check on Finalization • Disable Selection • Hide 	Validation	<ul style="list-style-type: none"> • Show Message • Check on Finalization 	Recommendation	<ul style="list-style-type: none"> • Prompt • Show Message • Check on Finalization 	Replacement	<ul style="list-style-type: none"> • Prompt • Show Message • Check on Finalization
Rule Type Selected	Options Available on the Action Intent Drop-Down												
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Recommendation	<ul style="list-style-type: none"> • Prompt • Show Message • Check on Finalization 												
Replacement	<ul style="list-style-type: none"> • Prompt • Show Message • Check on Finalization 												

Field	Description
Action Scope	<p>Select the action scope. Supported values are:</p> <ul style="list-style-type: none"> • Product: In the Product field, click to select a product to be included or excluded. You search the product using product name or code. • Product Family: In the Product Family field, enter a product family. One or more of the products from the product family will be included or excluded based on rule type and match rule specifications. • Product Group: In the Product Group field, enter a product group. One or more of the products from the product group will be included or excluded based on rule type and match rule specifications.
Action Item	<p>Enter a keyword to search a product, product family, or product group on which the action must be applied. From the displayed search result, select a product.</p>

4. You can now:
 - a. Create the rule with more conditions, actions, additional scopes, or additional criteria. Click **Advanced Rule Setup**. The rules details page with the Conditions & Actions tab is displayed.
 - b. Save the rule. Click **Save**. Only a constraint rule header is created. The rules details page with the Details tab is displayed.
5. On the Details tab, enter the following details:

Field	Description
Rule Name	Enter a name for the constraint rule.
Description	Description for the constraint rule.
Sequence	Enter the number in which you want to sequence the constraint rule.
Effective Date	Select the date from which the constraint rule is in effect.
Expiration Date	Select the date until which the constraint rule is valid.

Field	Description
Is Active	Turn this setting on to indicate whether the constraint rule is active.
Bundle Context	Turn this setting on to indicate whether the constraint is evaluated within a bundle.

- On the Conditions & Actions tab, create one or more constraint rule conditions and one or more constraint rule actions. For more information, see [Configuring a Constraint Rule Using the Advanced Rule Setup](#).
- Click **Save**.

A constraint rule is created and saved.

Configuring a Constraint Rule Using the Advanced Rule Setup


This section provides information on configuring a constraint rule using the Advanced Rule Setup. You may have created a constraint rule for a product or a product group. When you click Advanced Rule Setup on the rule creation page, the rules details page with the Conditions & Actions tab is displayed. You must configure a condition and an action to complete constraint rule creation.


Creating a Constraint Rule Condition



- On the Conditions & Actions tab, under the CONDITIONS section, click **Add Condition**.
- Select one of the following options from the **Scope** drop-down. The last column changes based on the scope you select. Enter a value name in the last column accordingly.


Option	Description
Product	<p>This implies that the product must be present in the shopping cart to fulfil the condition.</p> <ol style="list-style-type: none"> From the Scope drop-down, select Product. From the Operator drop-down, select Equals To. In the Product field, search and select a product.

Option	Description
<p>Product Family</p>	<p>This implies that one or more products from the specified product family must be present in the shopping cart to fulfil the condition. The number of products that should be present depends on the Match Rule.</p> <ul style="list-style-type: none"> a. From the Scope drop-down, select Product Family. b. From the Operator drop-down, select Equals To. c. In the Product Family field, search and select a product family.
<p>Product Group</p>	<p>This implies that one or more products from the specified product group must be present in the shopping cart to fulfil the condition. The number of products that should be present depends on the Match Rule.</p> <ul style="list-style-type: none"> a. From the Scope drop-down, select Product Group. b. From the Operator drop-down, select Equals To. c. In the Product Group field, search and select a product group.

Option	Description
Product Field Set	<p>This implies that when the value of the field specified in the product scope matches the value of the field on the cart, the constraint rule condition is fulfilled. You must add at least one product field. After selecting Product Field Set on the Scope drop-down, the + Add Field button is displayed to add product fields.</p> <ol style="list-style-type: none"> a. From the Scope drop-down, select Product Field Set. b. Click Add Field. c. Enter the following details: <ol style="list-style-type: none"> i. Product Field: Select a product field from the drop-down. ii. Operator: Select an operator. iii. Value: Enter the value of the product field. Each product field has one picklist value from the product object. <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p> You must set up the product field to have only one choice. If you update the choice later, you must also update the constraint rule condition with the product field set specification to have the correct values. Match Rule is not applied to product field set-based constraint rules. CPQ considers Match Rule as Match Any In Group by default in such cases.</p> </div>
Product Option Group	<p>This implies that one or more products from the specified product option group must be present in the shopping cart to fulfil the condition. The number of products that must be present depends on the Match Rule.</p> <ol style="list-style-type: none"> a. From the Scope drop-down, select Product Option Group. b. From the Operator drop-down, select Equals To. c. In the Product Option Group field, search and select an option group ID associated with the bundle.

3. Click the Condition Criteria icon  to define a constraint rule condition based on criteria. The Add Criteria pop-up is displayed. You can enter more than one criteria.
 - a. On the Conditions tab, click **Add Criteria** and enter the following details:
 - **Field:** Select a field on the product.

- **Operator:** Select an operator.
 - **Value:** Enter a value.
- b. Click **Add Criteria** to add more criteria.
 - c. Click the Remove icon  to delete a criteria.
 - d. Click **Remove All** to remove all criteria.
 - e. Turn the **Logic** button on if you have more than one criteria and enter a value in the **Logic** field.
 - f. On the Actions tab, define the criteria. For more information, see [Creating a Constraint Rule Action](#).
 - g. Click **Save**.
4. Click the Advanced Setup icon  to define advanced conditions. The Advanced Setup pop-up is displayed. You can define advanced logic if there is more than one conditions.
 - a. On the Conditions tab, enter the following details:
 - **Condition Name:** The name is populated automatically. You can edit the name if required.
 - **Match In:** Select an option where the condition match must happen. Supported values are:
 - Primary Lines: Selecting this means the condition is met only when the condition products are among the primary lines (bundle or standalone) of the shopping cart.
 - Options: Selecting this means the condition is met only when the condition products are in the option line items of the shopping cart.
 - Cart Options: Selecting this means the condition is met only when the condition products are among the cart line items of the shopping cart.
 - Location: CPQ does not support this option currently.
 - **Match Rule:** Select one of the following choices. There is no default value, which means that the rule condition is met if any one of the products in the product scope is selected. It is treated as Min/Max with Match Min Products as 1. Match count is done before applying the criteria.
 - **Match Any In Group** means that the rule condition is met if any one or more of the products from the group is selected. Match Any In Group is the same as Include Min/Max with Match Min Products as 1. It is also applicable to the Product Family and Product Field Set.

- **Match All In Group** means that all of the products from the group must be present in the shopping cart to meet the condition. This is applicable only to the product group and Product Family.
 - **Min/Max** also requires you to specify a min/max range.
 - a. **Min Products:** Enter a value for minimum products.
 - b. **Max Products:** Enter a value for maximum products.
 - b. On the Actions tab, define the action. For more information, see [Creating a Constraint Rule Action](#).
 - c. Click **Save**.
5. click **Add Condition**. to add more conditions.
 6. Click the Remove icon  to delete a condition.
 7. Click **Remove All** to remove all conditions.
 8. Turn the **Logic** button on and enter a value in the Logic field when you add multiple conditions.

When there is more than one condition for a constraint rule, this field defines when to consider one or more of the conditions using AND/OR association. The sequence number defined in the **Condition** column is used as an identifier of the condition.

Few examples, you defined conditions with sequence numbers as 1, 2, 3, 4, 5, and 6.

The following examples describe various condition associations:

Condition Association	Description
(1 AND (2 OR 3))	Either Conditions 1 and 2 or Conditions 1 and 3 must be satisfied on the cart
1 AND NOT 2	Condition 1 is in the cart while Condition 2 is not
1 AND NOT(2)	Condition 1 is in the cart while Condition 2 is not
1 AND 1	Only Condition 1 is evaluated on the cart. If you have defined multiple conditions, CPQ does not evaluate the remaining conditions
NOT(5 OR 6)	Neither Condition 5 nor 6 are in the cart
NOT 5 AND 6	Condition 5 is not in the cart, but Condition 6 is in the Cart.

It is recommended that you use the logical operator "AND" to display the resultant record if all the conditions separated by AND are TRUE. For instance, (1 OR 2) AND (3 OR 4) AND 5. If you enter an invalid condition association, an error is displayed when you save the constraint rule.

ⓘ You must set the Sequence for each condition or the Condition Association will be unreliable. Also, a constraint rule with only NOT in condition does not work. Example, NOT (1 AND 2).

The constraint rule conditions are created. You can now define a constraint rule action.

9. Click **Save** on the Conditions & Actions tab.

Creating a Constraint Rule Action

1. On the Conditions & Actions tab, under the ACTIONS section, click **Add Action**.
2. From **Action Type**, select one of the following:

Option	Description
Exclusion	Enforces exclusion of certain products from the shopping cart.
Inclusion	Enforces selection of certain products as specified by the product scope specification or criteria specification in the inclusion rule.
Recommendation	Product recommendations are displayed when the condition is met.
Replacement	Product replacements are suggested when the condition is met.
Validation	Displays the error message when the criteria conditions are met.

Action Type selection impacts the options available for **Action Intent** as shown in the following table:

Rule Type Selected	Options Available on the Action Intent Drop-Down
Inclusion	<ul style="list-style-type: none"> • Auto Include • Prompt • Show Message • Check on Finalization

Rule Type Selected	Options Available on the Action Intent Drop-Down
Exclusion	<ul style="list-style-type: none"> • Prompt • Show Message • Check on Finalization • Disable Selection • Hide
Validation	<ul style="list-style-type: none"> • Show Message • Check on Finalization
Recommendation	<ul style="list-style-type: none"> • Prompt • Show Message • Check on Finalization
Replacement	<ul style="list-style-type: none"> • Prompt • Show Message • Check on Finalization




- Constraint rules of **Action Types** = *Inclusion* and *Exclusion* supports **Match In Assets**.
- Constraint rules of **Action Types** = *Recommendation* and *Replacement* do not support **Condition Criteria** and work only for the **Scope**.


3. From **Action Intent**, select one of the following:


Option	Description
Auto Include	<p>Adds selected products automatically. When the number of products selected by the rule action is more than the number mentioned in the Match Rule condition, auto-inclusion of products is not triggered. A message is displayed from the rule action instead.</p> <p>Note: Auto Include is not applicable when the Match Rule value is Include All.</p>
Prompt	Displays a message with choices of products that you can select or remove.
Show Message	Displays a message.
Check on Finalization	Applies rule action on finalization of the shopping cart.

Option	Description
Disable Selection	Disables selection of excluded products.
Hide	Hides the selection of excluded products.

4. Select one of the following options from the **Scope** drop-down. The last column changes based on the scope you select. Enter a value name in the last column accordingly.

Option	Description
Product	<ul style="list-style-type: none"> a. From the Scope drop-down, select Product. b. In the Product field, search and select a product to be included or excluded.
Product Family	<ul style="list-style-type: none"> a. From the Scope drop-down, select Product Family. b. In the Product Family field, search and select a product family to be included or excluded. One or more of the products from the product family will be included or excluded based on rule type and match rule specifications.
Product Group	<ul style="list-style-type: none"> a. From the Scope drop-down, select Product Group. b. In the Product Group field, search and select a product group to be included or excluded. One or more of the products from the product group will be included or excluded based on rule type and match rule specifications.
Action Criteria	<p>Click Edit Action Criteria or the Condition Criteria icon  to define a constraint rule action.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p> The condition criteria icon  shows up when the Action Type is set to Validation.</p> </div>

5. Click the Condition Criteria icon  to define a constraint rule action based on criteria. The Add Criteria pop-up is displayed. You can enter more than one criteria.
- a. On the Actions tab, click **Add Criteria** and enter the following details:
 - **Field:** Select a field on the product.
 - **Operator:** Select an operator.

- **Value:** Enter a value.
 - b. Click **Add Criteria** to add more criteria.
 - c. Turn the **Logic** button on if you have more than one criteria and enter a value in the Logic field.
 - d. Click **Save**.
6. Click the Advanced Setup icon  to define advanced actions. The Advanced Setup pop-up is displayed.
- a. On the Conditions tab, update the conditions if required.
 - b. On the Actions tab, enter the following details:
 - i. **Action Name:** The name is populated automatically. You can edit the name if required.
 - ii. **Match In:** Select an option where the action match must happen.
Supported values are:
 - Primary Lines: Select this option to include or exclude the products that are primary line items (offering) based on your Action Type selection.
 - Options: Select this option to include or exclude the products that are options based on your Action Type selection.
 - Cart Options: Select this option to include or exclude the products that are cart line items based on your Action Type selection.
 - Assets: Select this option to include or exclude the products that are assets based on your Action Type selection.
 - iii. **Match Rule:** Applies to inclusion and exclusion type rule action only, and that has product scope as Product Family, Product Group, or Action Criteria. Select any one of the following to complete the rule action:
 - None: No product selection is allowed.
 - For inclusion type constraint rule:
 - Include Any: Allows selection of up to one product. Rest of the products in the prompt are disabled.
 - Include All: Allows selection of all products within the Product Group or Product Family. Note: Only this match rule works with Action Intent Auto Include.
 - Include Min/Max: Requires a minimum number of products specified in the Min Products field.
 - For exclusion type constraint rule:
 - Exclude All: All the products are excluded.
 - Exclude After One: Allows selection of only one product. Any other selection will trigger the rule action.
 - Exclude After Max: Allows selection of a maximum number of products specified in the Max Products field. Any other

selection over and above the specified number will trigger the rule action.

- iv. **Message Type:** Select one of the following values:
 - Error: If you select Error, you cannot finalize the cart unless you satisfy the constraint rule
 - Warning: If you select Warning, you can finalize the cart but the warning message is displayed on the cart until you satisfy the constraint rule.
 - v. **Message Details:** Enter text to be displayed when the rule action is effective. These messages can also be translated into multiple languages. For inclusion and exclusion type rule actions product name substitution parameters {0}, {1} can be used. For example: {0} requires {1}. For validation type rule actions only {0} will be substituted by triggering products.
 - vi. Click **Save**.
- c. Click **Save** on the Conditions & Actions tab.

Deleting a Constraint Rule

You can delete a constraint rules that is no longer required for your business requirements.

To delete a constraint rule

1. Go to ADMIN SETUP> Product Administration > Constraint Rules. The Constraint Rules page is displayed.
2. Click the ellipsis icon next to the constraint rule name and click **Delete**.

Managing the Categories

Categories are high-level logical groupings of products, affecting the way the Sales rep sees them for selection on the Product Catalog. A category can be created for browsing products in the Catalog page or they can be created for creating options groups for a Bundle product. Products are associated to a category through a category hierarchy. Category hierarchies are maintained using the Hierarchy Manager. They are also used to group the total price of the products belonging in a category on the Cart Summary.

Navigating the Categories Page


When you launch the Categories page on the UI, all the existing categories are listed on this page along with their details. There are various functionalities available for you to manage the categories.

Categories Search

You can narrow down the categories list using the search feature. You can either define search criteria to search for a range of categories or use the categories search option.


Basic Search

In basic search, you can search for a category using keywords. For example, you can search using the name of the category.

1. In the **Search this list** field, enter a keyword related to your category details such as category name.
2. Click the search icon  or press Enter. CPQ returns all categories that contain that keyword in the category details.

Advanced Search


In advanced search, you can search for a category using a search query.

1. Click the Advanced Search icon . The Advanced Search pop-up is displayed.
2. Enter the following details:
 - a. **Field:** All category fields are available in the drop-down list such as Category Name, Label, Parent Category, Leaf, Modified Date and Created Date.
 - b. **Operator:** Operators that are available for selection helps create the filter expression. Operators are displayed based on the field types. For example, a picklist value will display equal to and not equal operators and a text field will display equal to, not equal to, starts with, contain, does not contain operators. If it is a multi-value picklist, the application displays include and does not include operators.
 - c. **Value:** Enter a value.
3. Click **Add Criteria** if you want add more criteria in the advanced search.
4. Turn the **Logic** button on if you have more than one criteria and enter a value in the **Logic** field.
5. Click **Apply** to enable the search filter. CPQ returns all categories that match the criteria.

Sorting Categories

You can sort the categories by clicking the column names. The categories are sorted in descending order using the last modified date. Every time you click the column name, the sorting switches between ascending and descending order. You can adjust the column width by dragging the columns. Hover near the column boundaries till two-way arrow appears. Click when the arrow appears and drag left or right to adjust the column width.

Actions available on this page

- Click **Create New** to create a main category or sub-category .
- Click the ellipsis icon  next to the product name to edit or delete a category.
- Click the category name link to open the category details page.

Items per page

At the bottom of the page, you can see the total count of categories available. You can control the number of categories to be displayed on each page. You can select the number of categories from a predefined list. You cannot configure this list. By default, you see 20 records on each page.

By default, you can sort 10, 20, 30, 50, and 100 categories per page using the **Rows per page** drop-down. This feature works in association with the search and filter functions to display search records per page. You can use the < and > buttons to move to the next or the previous pages. You can also jump to a certain page using the page search component.

Creating a Category

1. Go to ADMIN SETUP> Product Administration > Catalog. The Catalog page is displayed.
2. Click the **Create New** drop-down button and click one of the following options:
 - a. **Main Category:** Creates a main category on the catalog.
 - b. **Sub Category:** Creates a subcategory under a main category on the catalog.
3. On the Details tab, enter the following details

Field	Description
Category Name	Enter a name for the category

Field	Description
Label	The label is populated automatically based on the category name you enter. Change it if required.
Description	Enter a description for the category.
Search Filter Fields	Select one or more search filter fields. Selected filter fields are displayed in the Refine Your Search section.
Default Search Category	Turn this setting on to display the product by default under the category or sub-category in the catalog page. If not, the user must first select the category from the category panel or the browse section to see the product.
Expanded By Default	Turn this setting on to indicate that the hierarchy is expanded at all times in the catalog page
Include In Total View	Turn this setting on to indicate that the mode is displayed in the totals view on the shopping cart
Hide All Search Filters	Turn this setting on to indicate that all the search filters in Narrow Your Search and Refine Your Search on the Catalog page are hidden.

4. Click **Save**.

Creating a Category Hierarchy


A category hierarchy defines the structure of the product catalog. You can add sub-categories (also known as nodes) to a category, reorder categories, and associate products, thus build a hierarchy. You can create multi-level categories. For example: Home > Laptops > Model.



Prerequisite


You must have an existing non-leaf category as a parent or main category. For more information, see [Creating a Category](#).


To build a category hierarchy

1. Go to ADMIN SETUP > Product Administration > Catalog. The Catalog page is displayed.

2. Search for the category in which you want to build a hierarchy.
3. Click the category name link to open the category details page.
4. In the Catalog section on the left side, click the expand icon  to view the existing category hierarchy of selected category so that I can view sub-categories and associated products.

 • The  icon indicates how many sub-categories are associated with the parent category.

• The  icon indicates how many price lists are associated with the parent category.


5. Click the ellipsis icon  on to the category and click:
 - **New Sub Category.** A placeholder for the sub-category is added under the parent category.
 - i. On the Details tab, enter the following details :

Field	Description
Category Name	Enter a name for the category.
Label	The label is populated automatically based on the category name you enter. Change it if required.
Description	Enter a description for the category.
Search Filter Fields	Select one or more search filter fields. Selected filter fields are displayed in the Refine Your Search section.
Default Search Category	Turn this setting on to display the product by default under the category or sub-category in the catalog page. If not, the user must first select the category from the category panel or the browse section to see the product.
Expanded By Default	Turn this setting on to indicate that the hierarchy is expanded at all times in the catalog page


Field	Description
Include In Total View	Turn this setting on to indicate that the mode is displayed in the totals view on the shopping cart
Hide All Search Filters	Turn this setting on to indicate that all the search filters in Narrow Your Search and Refine Your Search on the Catalog page are hidden.


ii. Click **Save**.

- **Add Sub Category From Existing.** The Add Category pop-up is displayed.



 You can create sub-categories under a non-leaf category or sub-category (which does not have products associated with it).

- In the Search this list box, enter keywords to search the category you want to associate with the parent category.
- Select the category and click **Add**. The category with associated products is added to the parent category.

- Use the  icon to move the category up and down in the category hierarchy.

 You can rearrange the order of the categories so that most-used or purchased categories appear at the top of the list in the catalog.

To delete a category from the category hierarchy


- Go to ADMIN SETUP > Product Administration > Catalog. The Catalog page is displayed.
- Search for the category from which you want to remove a sub-category.
- Click the category name link to open the category details page.
- In the Catalog section on the left side, click the expand icon  to view the existing category hierarchy of selected category so that I can view sub-categories and associated products.
- Click the ellipsis icon  on to the category and click **Delete**. The Delete Category pop-up is displayed.
- Click **Confirm**.


Adding Price Lists to a Category

You can associate more than one price list with a category.

To add a price list to a category


1. Go to ADMIN SETUP > Product Administration > Catalog. The Catalog page is displayed.
2. Search for the category to which you want to add price lists.
3. Click the category name link to open the category details page.
4. On the category hierarchy, select a category to which you want to add price lists.


 You can add a price list to any category in the hierarchy (main or sub-category). The same price list reflects in all categories in the hierarchy.

5. Go to the Price Lists tab. If any price list is associated with the category, you can see it.
6. Click **Add Price List**. The Add Price List pop-up is displayed.
7. In the Search this list box, enter keywords to search the price list you want to associate with the category.
8. Select the price list and click **Add**. The price list is added and displayed in the price lists section on the right side.
9. To add another price list, click **Add Price List** again.
10. Use the  icon to move the price lists up and down in the price lists section.

To delete a price list from a category

1. Go to ADMIN SETUP > Product Administration > Catalog. The Catalog page is displayed.
2. Search for the category from which you want to remove price lists.

 You can sort price lists based on the price list names. You can also use the rows per page to find required price lists.


3. Click the category name link to open the category details page.
4. On the category hierarchy, select the category from which you want to remove the price lists.
5. On the Price Lists tab, in the Search this list box, enter keywords to search the price list you want to remove from the category.
6. Click the delete icon  for the price list you want to remove.

Adding Products to a Category


You can add products to categories and sub-categories so that the sales representatives can easily navigate through the category hierarchy and select the right product during runtime. You can add multiple products to categories.


To add a product to a category


1. Go to ADMIN SETUP> Product Administration > Catalog. The Catalog page is displayed.
2. Search for the category to which you want to add products.
3. Click the category name link to open the category details page.
4. On the category hierarchy, select the category to which you want to add the products.

 You can associate products only to leaf categories. If a category has a sub-category, you cannot associate any products to it. The **Add Products** button on the Products tab is disabled. Therefore, ensure that you select the right category before you add products.

5. On the Products tab, click **Add Products**. The Add Product pop-up is displayed.
6. In the Search this list box, enter keywords to search the product you want to associate with the category.


 You can search products from list of product available in the price lists if the category is associated with a price list. If not, you can search products from all products.


7. Select the product and click **Add**. The product is added and displayed in the products section on the right side.
8. To add another product, click **Add Product** again.
9. Use the  icon to move the products up and down in the products section.

 You can rearrange the order of the products so that most-used or purchased products appear at the top of the list in the category.

To delete a product from a category

1. Go to ADMIN SETUP> Product Administration > Catalog. The Catalog page is displayed.
2. Search for the category from which you want to remove products.

 You can sort products based on the product names. You can also use the rows per page to find required products.

3. Click the category name link to open the category details page.
4. On the category hierarchy, select the category from which you want to remove the products.
5. On the Products tab, in the Search this list box, enter keywords to search the product you want to remove from the category.
6. Click the delete icon  for the product you want to remove.

Managing the Option Groups

Option Groups in the Conga platform are categories used to organize and group option products for association with bundles. They facilitate the process of configuring product bundles. Option Groups can also be used as categories, and they are divided into two types: Shared Option Groups and Standalone Option Groups.

Types of Option Groups

1. **Shared Option Groups:**

Shared Option Groups can be associated with multiple bundles. These groups are ideal for option products that are common across various bundles. Using Shared Option Groups ensures that updates to the group structure reflect across all associated bundles.

2. **Standalone Option Groups:** Standalone Option Groups are specific to a single bundle. These groups are suitable for unique option products tailored to a specific bundle. While Standalone Option Groups can be associated with other bundles, only the initial group structure is retained. Any changes made after the first save are not reflected in subsequent associations. Standalone Option Groups allow for tailored configurations for individual bundles.

Use Cases

1. **Product Configuration:** Structuring and management of option products within bundles for various product configurations.
2. **Consistency Across Bundles:** Using Shared Option Groups to ensure consistent option offerings across multiple bundles.
3. **Tailored Bundles:** Employing Standalone Option Groups for unique, bundle-specific option configurations.


Navigating the Option Groups Page

When you launch the Options Group page on the UI, all the existing option groups are listed on this page along with their details. There are various functionalities available for you to manage the option groups.

Managing Views

You can manage column width, control which columns are displayed in the grid, freeze/pin a column range, or rearrange the column order. You can also filter the view of records in the grid by performing a keyword search, filtering the list by column value, or applying one or more advanced filters and filter logic. For more information, see [Managing the View Settings](#) and [Filtering the Records](#).

Actions available on this page

- Click **Create New** to create a new option group.
- Click the ellipsis icon () next to the option group name to **Clone** or **Delete** an existing option group.
- Click the option group name link to open the Option Group details page.
- Export the selected option groups. For more information, see [Exporting Records](#).
- On the Products tab, associate products with the option group.

This section provides information on configuring option groups.

Refer to the following topics for more information.

- [Creating an Option Group](#)
- [Associating Products with an Option Group](#)
- [Removing an Associate Product From the Option Group](#)
- [Editing an Option Group](#)
- [Deleting an Option Group](#)
- [Using the Where used Option for an Option Group](#)

Creating an Option Group

Option groups are a type of category that is used to group option products together to be associated with bundles. Option groups are further categorized into two types Shared and Standalone. You can create these option groups in the parent option group's details page.

To create an option group

1. Go to ADMIN SETUP > Product Administration > Option Groups. The Option Groups page is displayed.
2. Click **Create New**. The Option Group details page is displayed.
3. On the Details tab, enter the following details:
 - Click Browse file or Drag and drop the file to upload and attach an image to the option group. This step is not mandatory.
 - Option Group Name: Enter a name for the option group.
 - Label: The label is populated automatically based on the option group name you enter.
 - Type: Select the type of option group:
 - Shared: This type of option group can be associated with multiple bundles.
 - Standalone: This type of option group is bundle-specific.
 - Description: Enter a description of the option group.
 - Expanded By Default: Turn this setting on to expand the option groups in the config page based on your requirement.
4. Click **Save**.

To create a sub-option group, see [Creating Sub Option Group](#).


[Associating Products with an Option Group](#)

[Editing an Option Group](#)

Creating a Sub Option Group

You can create option group hierarchies based on your business requirement. You can also create sub-option groups in the existing option group. The option group for which you are creating a sub-option group is considered a parent option group.

To create a sub-option group

1. Go to ADMIN SETUP > Product Administration > Option Groups. The Option Groups page is displayed.
2. Click the parent option group to create a new option group. The option group details page is displayed.
3. Click the vertical ellipsis () icon next to the option group name and click **New Sub Option Group**.
4. In the right panel, in the Details tab, enter the option group name. The Label field is filled automatically.

5. From the Type drop-down, select the option group type. The supported values are Standalone and Shared.
6. Enter the description of the new sub-option group.
7. Click **Save**. A new sub-option group is tagged to the existing option group as a hierarchy.

Repeat from step 3 to step 7 to add more sub-option groups. You can create multiple levels of sub-option groups.

Creating the Option Groups


Associating Products with an Option Group



This section provide information on association of products with an option group.


To associate a product with an option group

1. Go to **ADMIN SETUP > Product Administration > Option Groups**. The Option Groups page is displayed.
2. Search for the required option group and click the option group name link. The Option Group details page is displayed.
3. Click the Products tab.
4. Click **Add Product**. The Add Product pop-up is displayed.
5. **Advanced Search**

In advanced search, you can search for a product using a search query. The search query uses options provided in Field, Operator, and Value and displays a search result that matches the criteria.

- a. Click the Advanced Search icon . The Advanced Search pop-up is displayed.
 - b. Click **Add Criteria**.
 - c. Enter the following details:
 - i. **Field**: All product field options are available in the drop-down list such as product Name, Product Code, and Configuration Type.
 - ii. **Operator**: Operators that are available for selection helps create the filter expression. Operators are displayed based on the field types.
 - iii. **Value**: Enter a value.
 - d. Click **Add Criteria** if you want add more criteria in the advanced search.
 - e. Review the filter expression.
 - f. Click **Apply** to enable the search filter. CPQ returns all products that match the criteria.
6. Click the checkbox beside Product Name column. You can select one product, multiple products, or all the products.

7. Click the () icon to export the selected products in CSV or Excel file format.
8. Click **Add** button.
9. Use the  icon to move the products up and down in the products section.

 You can rearrange the order of the products so that most-used or purchased products appear at the top of the list in the option group.


To delete an associated product from an option group, see [Deleting an Associate Product From the Option Group](#).

[Creating the Option Groups](#)

Removing an Associate Product From the Option Group

You can remove an associated product from the option group.

To delete an associated product from an option group

1. Go to **ADMIN SETUP > Product Administration > Option Groups**. The Option Groups page is displayed.
2. Search for the required option group from which you want to remove products. You can sort products based on the product names. You can also use the rows per page to find required products.
3. Click the option group name link. The Option Group details page is displayed.
4. Click the Products tab. You can see a list of products associated with the option group.
5. In the **Search this list** field, enter keywords to search the product you want to remove from the option group and search.
6. Click the remove icon  for the product you want to remove.

[Associating Products with an Option Group](#)

Editing an Option Group

You can edit any option group as required. This feature enables you to make the necessary changes to the option group configuration when the requirement changes.

To edit an option group

1. Go to **ADMIN SETUP > Product Administration > Option Groups**. The Option Groups page is displayed.

2. Search for the option group you want to edit.
3. Click the option group name. The Option Group Details page is displayed.
4. Edit the required fields.
5. Click **Save**.

Deleting an Option Group

You can delete Option groups that are no longer required.




Deleting an Option Group

When deleting an root or child option group, if one or more products are associated with the option group, it cannot be deleted, and a validation error is triggered. However, if no products are associated, the behavior depends on the `deleteHierarchy` query parameter. If `deleteHierarchy` is set to `true`, the option group along with all its children should be deleted. If the parameter is set to `false` or not passed at all, the option group are deleted, and separate hierarchies should be created for all immediate children.

Deleting a Product Option Group

For the deletion of a product option group (Root or Child, Standalone or Shared), the entire product option group and its children should be removed, along with all corresponding product option components. The parent product option group of the deleted group should then derive its `IsLeaf` value solely from the corresponding option group. This deletion process does not affect the corresponding option group or other product option groups.

To delete an option group

1. Go to **ADMIN SETUP > Product Administration > Option Groups**. The Option Groups page is displayed.
2. Search for the option group and do one of the following:
 - To delete a single option group, click the ellipsis icon () next to the option group name, and click **Delete**.
 - To delete multiple option groups, click the checkboxes next to the name column, and click the () icon.
 - To delete all the option groups, click the checkbox in the header row next to the name column, and click the () icon.
3. Click **Confirm**.

Using the Where used Option for an Option Group

You can view Constraint rules and Associated Bundles that are associated with the Option Group in the pop-up. The information displayed in this panel is in read-only format.

To use the Where used Option

1. Go to **ADMIN SETUP > Product Administration > Option Groups**. The Option Groups page is displayed.
2. Search and click on the option group name to view the details.
3. Click the **Where used** button in the top right corner.
4. In the Used Locations pop-up, do the following:
 - Review the number of constraint rules and associated bundles that are associated with the option group.
 - Click the **Associated Bundles** tab. You can see the products where the option group is referenced by a product option group.
 - Click the **Constraint Rules** tab. You can see the list of all constraint rules where option group is used as scope.
 - Click on the name of a Constraint Rule or an Associated Bundle to view additional details in a new tab.
 - Search and sort constraint rules and associated bundles
5. Click **Close**.

Managing the Attributes and Attribute Groups

Attributes

An Attribute represents a specific characteristic or feature of a product. Attributes can range from physical properties like color and size to technical specifications such as weight and material.

Examples of Attributes

1. Color: Red, Blue, Green
2. Size: Small, Medium, Large
3. Weight: 1kg, 2kg, 5kg

Functionality

1. Pricing Determination: Attributes can influence the pricing of products based on specific configurations. For example, a larger size may cost more than a smaller size.
2. Informational Details: Attributes provide additional information for each line item, helping customers understand product specifications.
3. Product Configuration: Attributes allow for the customization and filtering of products to meet specific customer requirements.

Attribute Groups

An Attribute Group is a collection of attributes that can be associated with products. Attribute Groups help in organizing attributes into manageable sets, making it easier to assign and maintain them across different products.

Examples of Attribute Groups

1. Physical Characteristics: Color, Size, Weight
2. Technical Specifications: Processor Type, RAM, Storage
3. Material Properties: Fabric Type, Durability, Waterproofing

Functionality:

1. Organization: Attribute Groups simplify the management of multiple attributes by grouping related attributes together.
2. Association: Groups can be associated with products to streamline the attribute assignment process.
3. Management: The Attributes administration page enables users to create, delete, and manage Attribute Groups. Users can also control the sequence in which these groups are associated with products.

Use Cases of Attributes and Attribute Groups

1. Product Customization: Attributes allow for detailed customization of products to match customer preferences.
2. Efficient Product Management: Attribute Groups facilitate the streamlined assignment and management of attributes across a product catalog.
3. Pricing Strategy: Attributes can be used to implement dynamic pricing models based on product specifications.


Navigating the Attributes Page

When you launch the Attributes page on the UI, all the existing attributes are listed on this page along with their details. There are various functionalities available for you to manage the attributes.

Managing Views

You can manage column width, control which columns are displayed in the grid, freeze/pin a column range, or rearrange the column order. You can also filter the view of records in the grid by performing a keyword search, filtering the list by column value, or applying one or more advanced filters and filter logic. For more information, see [Managing the View Settings](#) and [Filtering the Records](#).

Actions available on this page

- Click **Create New** to create a new attribute or attribute group.
- Click the ellipsis icon () next to the product name to delete the attribute.
- Click the attribute name link to open the Attribute Details page.
- Export the selected attributes. For more information, see [Exporting Records](#).

The following section provides information on configuring attributes and attribute groups.

- [Creating an Attribute](#)
- [Creating an Attribute Group](#)
- [Associating an Attribute to an Attribute Group](#)
- [Associating Products under Attribute Groups](#)
- [Removing an Associated Attribute from the Attribute Group](#)
- [Removing an Associated Product from the Attribute Group](#)
- [Editing an Attribute](#)
- [Editing an Attribute Group](#)
- [Deleting an Attribute](#)
- [Deleting an Attribute Group](#)

Creating an Attribute

You can create an attribute as per your business requirements.

To create an attribute

1. Go to **ADMIN SETUP > Product Administration > Attributes**. The Attributes page is displayed.
2. Click the **Create New** drop-down button and click **Attribute**. The New Attribute page is displayed.
3. On the **Data Type** drop-down, select a data type.

Data Type	Description
String	Allows users to enter any text. Default length is 2000.
Int	Allows users to enter any number. Leading zeros are removed.
Double	Allows users to enter any number. Leading zeros are removed.
Currency	Allows users to enter any number. Leading zeros are removed.
Boolean	Allows users to enable or disable a checkbox.
Date Time	Date Time description here...
Lookup	Lookup description here...
Picklist	Allows users to select a value from a list you define.
Multi Picklist	Allows users to select a value from a list you define.

4. In the **Attribute Name** field, enter a name for the attribute.
5. The **Display Name** field is populated automatically based on the attribute name you enter. Change it if required.
6. In the **Description** field, enter a description for the attribute.
7. In the **Default Value** field, enter a default value for the attribute. If you select **Data Type** as Picklist or Multi Picklist, you must select the default value from the **Default Value** drop-down.
8. The **Default Value** will be defined by adding the **List Values**.
9. Turn the **Is Required** setting on to make this attribute as a required attribute.
10. Click **Save**. to save this attribute or **Save & Create New** to save this attribute and create another attribute.

11. To discard your changes:

- a. Click **Discard Changes**. The Alert pop-up is displayed prompting you to confirm discard.
- b. Click **Don't Save**.

To edit an attribute, see [Editing an Attribute](#).

To delete an attribute, see [Deleting Attribute](#).

Creating an Attribute Group

You can create an attribute group as per your business requirements.

To create an attribute group

1. Go to **ADMIN SETUP > Product Administration > Attributes**. The Attributes page is displayed.
2. Click the **Create New** drop-down button and click **Attribute Group**. The New Attribute Group page is displayed.
3. In **Attribute Group Name** field, enter a name for the attribute group name.
4. From the **Display Attributes In** drop-down, select an option. The supported values are:
 - a. Two column
 - b. Three column
5. In the **Description** field, enter a description for the attribute group.
6. Click **Save**.
7. Go to the **Attributes** tab to associate attributes to the attribute group you created. For more information, see [Associate an Attribute to an Attribute Group](#).
8. Go to the **Associated Products** tab to associate products to the attribute group you created. For more information, see [Associated Products under Attribute Groups](#).

To edit an attribute group, see [Editing an Attribute Group](#).

To delete an attribute group, see [Deleting an Attribute Group](#).



Associating an Attribute to an Attribute Group

Associating attributes to attribute groups is a crucial step in organizing product characteristics within the Conga platform. This association allows for a structured and systematic approach to managing product features, ensuring that each product is configured with the relevant attributes. By grouping attributes, you can simplify product

management, improve filtering capabilities, and ensure that pricing and product information are aligned with customer requirements.

To associate an attribute to an attribute group

1. Go to **ADMIN SETUP > Product Administration > Attributes**. The Attributes page is displayed.
2. Click the **Attribute Groups** tab.
3. Search for the attribute group to update.
4. Click the attribute group name link to open the Attribute Group details page.
5. Click the **Attributes** tab.
6. Under Available Attribute Groups, you can see all attribute groups available in the org.
7. In the **Search Attribute** box, enter keywords to search the attribute you want to associate with the attribute group.
8. Hover the mouse on the required attribute and click + next to the attribute name. The product is associated with the product group and is displayed under the associated attributes section.


 Hover the mouse on the required attribute and click the info  icon next to the attribute name to display the description of the attribute.



9. Create an attribute:
 - If the desired attribute does not exist, click **Create New Attribute** under the Available Attributes page.
 - The New Attribute page will be displayed.
 - Follow the steps in [Creating an Attribute](#) to configure the new attribute.
 - After configuring and saving the new attribute, return to the Associated Attributes page.
 - Search for the newly created attribute as described in step 7 and associate it with the attribute group.
10. Turn the following settings on if required:

Setting	Description
Is Read Only	Indicates that the value of the attribute is not editable. The user cannot edit the value.
Is Hidden	Indicates that the attribute is not displayed on the configuration page. However, the attribute is associated with the attribute group.

Setting	Description
Is Primary	Indicates that the attribute is critical and the attribute is displayed on the Installed Products page as a critical attribute.

11. Click **Save**.

 The **Save** button is enabled only when you make any changes to the associated attributes.

 You can reorder the Attributes by moving the order  icon up or down.

12. To discard changes:
- a. Click **Discard Changes**. The Alert pop-up is displayed.
 - b. Click **Don't Save**.

[Creating Attribute](#)

[Creating Attribute Group](#)

Associating Products under Attribute Groups

Associating products with attribute groups is an essential process within the Conga platform that ensures products are configured with the appropriate characteristics. This involves linking specific products to the attribute groups that have been created, allowing for detailed management of product features such as color, size, weight, and more.


To associate products to the Attribute groups

1. Go to **ADMIN SETUP > Product Administration > Attributes**. The Attributes page is displayed.
2. Click the **Attribute Groups** tab.
3. Search for the attribute group to update.
4. Click the attribute group name link to open the Attribute Group details page.
5. Click the **Associated Products** tab.
6. Click Available products, the right pane will open.
7. In the **Search Products** box, enter keywords to search the products you want to associate with the attribute group.

8. Hover the mouse on the required product and click + next to the product name. The product is associated with the attribute group and is displayed under the associated products section.

 Hover the mouse on the required product and click the info () icon next to the associated product name to display the description of the product.

9. To delete an associated product from the attribute group:
 - a. Under the associated products section, enter the name of the product you want to search in the **Search the list** box and press **Enter**. Products that match the search are displayed.
 - b. Click the ellipsis icon and select the **Remove** button.
 - c. Click **Confirm**.
10. Click **Save**.

 • The **Save** button is enabled only when you make any changes to the associated products.

11. To discard changes:
 - a. Click **Discard Changes**. The Alert pop-up is displayed.
 - b. Click **Don't Save**.

[Creating Attribute](#)


[Creating Attribute Group](#)

[Creating a Product](#)

Removing an Associated Attribute from the Attribute Group


You can remove an associated attribute from the attribute group.

To remove an associated attribute from an attribute group

1. Go to **ADMIN SETUP > Product Administration > Attribute**. Click the Attribute Group tab.
2. The Attribute Groups page is displayed. Search for the attribute group from where you want to remove the associated attribute.
3. Click the attribute group name. The Attribute group Details page is displayed.
4. Click the **Attributes** tab. Search for the attribute you want to remove.
5. Click the delete () icon.
6. The Delete Attribute pop-up is displayed.
7. Click **Confirm**.

Removing an Associated Product from the Attribute Group

To remove an associated product from an attribute group

1. Go to **ADMIN SETUP > Product Administration > Attribute**. Click the Attribute Group tab.
2. The Attribute Groups page is displayed. Search for the attribute group from where you want to remove the associated product.
3. Click the attribute group name. The Attribute group Details page is displayed.
4. Click the **Associated Product** tab. Search for the product you want to remove.
5. Click the ellipsis () icon. Click **Remove**.
6. The Remove Product pop-up is displayed.
7. Click **Confirm**.

Editing an Attribute

You can edit any attribute as required. This feature enables you to make the necessary changes to the attribute configuration when the requirement changes.

To edit an attribute

1. Go to **ADMIN SETUP > Product Administration > Attributes**.
2. Search for the attribute you want to edit.
3. Click the attribute name. The Attribute Details page is displayed.
4. Edit the required fields.
5. Click **Save**.

[Creating Attribute](#)

Editing an Attribute Group

You can edit any attribute as required. This feature enables you to make the necessary changes to the attribute configuration when the requirement changes.

To edit an attribute group

1. Go to **ADMIN SETUP > Product Administration > Attribute**. Click the Attribute Group tab.
2. The Attribute Groups page is displayed. Search for the attribute group to edit.




3. Click the attribute group name and the Attribute group Details page is displayed.
4. Edit the required fields.
5. Click **Save**.

Creating Attribute Group

Deleting an Attribute

You can delete attributes that are no longer required for your business requirements.



To delete an attribute


1. Go to ADMIN SETUP > Product Administration > Attributes. The Attribute page is displayed.
2. Search for the attribute, and do one of the following:
 - To delete a single attribute, click the ellipsis icon () next to the attribute name, and click **Delete**.
 - To delete multiple attributes, click the checkboxes next to the name column, and click the () icon.
 - To delete all the attributes, click the checkbox in the header row next to the name column, and click the () icon.
3. Click **Confirm**.

Deleting an Attribute Group

You can delete attribute groups that are no longer required for your business requirements.

To delete an attribute group

1. Go to **ADMIN SETUP > Product Administration > Attributes**. The Attributes page is displayed.
2. Click the **Attribute Group** tab.
3. The Attribute Groups page is displayed. Search for the attribute group and do one of the following:
 - To delete a single attribute group, click the ellipsis icon () next to the attribute group name, and click **Delete**.
 - To delete multiple attribute groups, click the checkboxes next to the name column, and click the () icon.

- To delete all the attribute groups, click the checkbox in the header row next to the name column, and click the () icon.
4. Click **Confirm**.

Managing Product Attribute Rules and Attribute Value Matrices

Product Attribute Rules (PAR)

PAR are a set of rules that govern the behavior and constraints of product attributes within the Conga Platform. These rules ensure that product configurations follows predefined standards and business logic.

Key Components

1. Attribute Definition: Specifies the characteristics and constraints of an attribute.
2. Product Scope: Define the product, product family, and product group.
3. Rule Actions: Outline the actions to be taken when the conditions are met, such as updating values or triggering notifications.

Use Cases

1. Ensuring Data Integrity: Enforcing constraints on attribute values to maintain data accuracy.
2. Automating Processes: Triggering automated actions based on attribute values.
3. Enhancing Product Configurability: Enabling complex product configurations through dynamic attribute rules.

Attribute Value Matrices (AVM)

AVMs provide a structured way to manage and map out the relationships between different attribute values. This matrix format allows the management of complex attribute dependencies and combinations.

Key Components

1. Matrix Definition: Specifies the structure and dimensions of the matrix, defining which attributes are included.

2. **Attribute Scope:** Define the product, product family, product group, and account location.
3. **Value Mapping:** Details the possible values for each attribute and how they interrelate within the matrix.
4. **Dependency Rules:** Outline the dependencies and constraints between different attribute values.

Use Cases

1. **Managing Complex Configurations:** Simplifying the management of products with multiple interdependent attributes.
2. **Ensuring Consistency:** Maintaining consistent and valid attribute value combinations across products.
3. **Streamlining Product Setup:** Facilitating the efficient setup and modification of product configurations through structured attribute management.


Navigating the Attributes Page

When you launch the Attributes Rules page on the UI, all the existing PAR and AVM are listed on this page on their respective tiles along with their details. There are various functionalities available for you to manage the attributes.

Managing Views

You can manage column width, control which columns are displayed in the grid, freeze/pin a column range, or rearrange the column order. You can also filter the view of records in the grid by performing a keyword search, filtering the list by column value, or applying one or more advanced filters and filter logic. For more information, see [Managing the View Settings](#) and [Filtering the Records](#).

Actions available on this tab

- Click **Create New > Attribute Value Matrix** to create a new AVM.
- Click **Create New > Product Attribute Rule** to create a new PAR.
- Click the ellipsis icon () next to the PAR or AVM name to delete an existing rule.
- Use the **Active** switch to activate or deactivate a PAR or AVM.
- At the top of the page, you can see Product Attribute Rules and Attribute Value Matrices tiles along with a total count of rules under that rule type. Click the required tile to view a list of rules or matrices.
- Export the selected PAR or AVM. For more information, see [Exporting Records](#).

The following section provides information on configuring PAR and AVM.

- [Creating a Product Attribute Rule](#)
- [Creating an Attribute Value Matrix](#)
- [Editing a Product Attribute Rule](#)
- [Editing an Attribute Value Matrix](#)
- [Deleting a Product Attribute Rule](#)
- [Deleting an Attribute Value Matrix](#)

Creating a Product Attribute Rule

You can create an Product Attribute Rules (PAR) as per your business requirements.

To create a PAR

1. Go to **ADMIN SETUP > Product Administration > Attributes Rules**. The Attributes Rules page is displayed.
2. Click the **Create New** drop-down button and click **Product Attribute Rule**. The New Product Attribute Rule page is displayed.
3. Enter the following details:

Field	Description
Rule Name	Enter a name for the Product Attribute Rule.
Is Active	The active toggle should be enabled only when both the scope and action are defined. Until then, the toggle remains disabled.
Description	Enter a description for the Product Attribute Rule.
Effective Date	Select the date when the product attribute rule is in effect. Leave this field blank if you want this product attribute rule to be always effective.
Expiration Date	Select the date when the product attribute rule will become invalid. Leave this field blank if you want this product attribute rule to be always effective.

4. Click **Save**. A PAR is created.

5. On the Details tab, make changes if required.
6. Click the Scope & Action tab.
7. Under PRODUCT SCOPE section, enter the following details:

Field	Description
PRODUCT SCOPE	
Product	It is a multi-select field. Click in the text box to view the available products and select the appropriate ones. You can also enter a keyword and search for a product. The products are filtered on the basis of product families and product groups that you select.
Product Family	It is a multi-select field. Click in the text box to view the available product families and select the appropriate ones. You can also enter a keyword and search for a product family.
Product Group	It is a multi-select field. Click in the text box to view the available product groups and select the appropriate ones. You can also enter a keyword and search for a product group. The product groups are filtered on the basis of product families that you select.
Criteria	Enter the formula to be evaluated. When this formula evaluates to true, the rule is executed.
ACTIONS	
Target Field	Search and select the target attribute. Use type ahead to display a list of applicable fields or attributes.
Action Type	Select the action that you want to perform on the product attribute. Supported values are: <ul style="list-style-type: none"> • Allow - To restrict the visibility of values on the target field. • Default - To add a default value on the target attribute. • Hidden - To hide the target attribute. • Disabled - To make the target attribute as a read-only field. • Required - To make the target attribute as a required field. • Reset - To auto-populate a default value on the target attribute if the field is left blank.

Field	Description
Value Expression	Enter the Value Expression.

- Click **Save**.

[Editing a Product Attribute Rule](#)

[Deleting a Product Attribute Rule](#)

Creating an Attribute Value Matrix

You can create an Attribute Value Matrices (AVM) as per your business requirements.

To create AVM



1. Go to **ADMIN SETUP > Product Administration > Attributes Rules**. The Attributes Rules page is displayed.
2. Click the **Create New** drop-down button and click **Attribute Value Matrix(AVM)**. The New Product Attribute Matrix page is displayed.
3. Enter the following details:

Field	Description
Rule Name	Enter a name of the Attribute Value Matrix.
Is Active	Turn this setting on to make the matrix active.
Description	Enter a description of the Attribute Value Matrix.
Effective Date	Select the date from which the Attribute Value Matrix is in effect.
Expiration Date	Select the date until which the attribute value matrix is valid.

Field	Description
Application Type	<p>Select the application type. Supported values are</p> <ul style="list-style-type: none"> • Default: Selecting this lets you choose the picklist values which you have configured as default values in the Matrix View. The rest of the values are visible in the drop-down list, but you cannot select any of them on the Cart. • Constraint: Selecting this value lets you choose only those picklist values which you have configured in the Matrix View. All the other values are disabled in the drop-down list on the cart. This also works with the Multi-select picklist. • Force Set: Selecting this value lets you automatically set the picklist values which you have configured in the Matrix View (considering the last user selection). As soon as you change the attribute value for one attribute, the system sets the attribute values for other attributes immediately. If there is a Matrix entry with null values and Treat Null As Wildcard is set to false, the system resets the attribute values to null.
Treat Null as Wildcard	<p>This field works in conjunction with Application Type. If you select this check box, all the picklist values (default or constrained) configured in the Matrix View are available for selection on the Cart. Deselecting this check box disables all the picklist values on the Cart.</p>

4. Click **Save**. An AVM is created.
5. On the Details tab, make changes if required.
6. Click the Scope & Matrix tab.
7. Enter the following details:

Field	Description
SCOPE	

Field	Description
Product	<p>It is a multi-select field. Click in the text box to view the available products and select the appropriate ones. You can also enter a keyword and search for a product. The products are filtered on the basis of product families and product groups that you select.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> If you create an AVM from a product, the product is populated on this field based on the parent product.</p> </div>
Product Family	<p>It is a multi-select field. Click in the text box to view the available product families and select the appropriate ones. You can also enter a keyword and search for a Product Family.</p>
Product Group	<p>It is a multi-select field. Click in the text box to view the available product groups and select the appropriate ones. You can also enter a keyword and search for a product group. The product groups are filtered on the basis of product families that you select.</p>
Account Location	<p>It is a multi-select field. Click in the text box to view the available account locations and select the appropriate ones. You can also enter a keyword and search for a location. The locations are filtered on the basis of product families, product groups, and products that you select.</p>
CHOOSE ATTRIBUTE TO CREATE MATRIX	
Attribute	<p>This field is used to define the attributes to be used with the matrices.</p> <p>If you need to define different matrices for different attributes, make sure the attribute column is added. If you would like to add another attribute, Click the (+) icon and select the value from the picklist and click the Update Matrix button.</p>
MATRICES	
Column Name	<p>As per the passed Attribute values, the Matrix Table should be created. One or more than one matrices can be provided in the Matrix by clicking on Add button and you can delete a particular row by clicking the delete icon () icon.</p> <p>In the Matrix, enter the relevant values.</p>

8. Click **Save**.

[Editing an Attribute Value Matrix](#)

[Deleting an Attribute Value Matrices](#)

Editing a Product Attribute Rule

You can edit any Product Attribute Rule (PAR) as required. This feature enables you to make the necessary changes to the PAR configuration when the requirement changes.

To edit a PAR

1. Go to **ADMIN SETUP > Product Administration > Attributes Rules**. The Attributes Rules page is displayed.
2. In the PAR section, search for the PAR you want to edit.
3. Click the PAR name. The PAR Details page is displayed.
4. Edit the required fields.
5. Click **Save**.

[Creating a PAR](#)

Editing an Attribute Value Matrix

You can edit any Attribute Value Matrix (AVM) as required. This feature enables you to make the necessary changes to the AVM configuration when the requirement changes.

To edit a AVM




1. Go to **ADMIN SETUP > Product Administration > Attributes Rules**. The Attributes Rules page is displayed.
2. In the AVM section, search for the AVM you want to edit.
3. Click the AVM name. The AVM Details page is displayed.
4. Edit the required fields.
5. Click **Save**.

[Creating an Attribute Value Matrix](#)

Deleting a Product Attribute Rule

You can delete Product Attribute Rules (PAR) that are no longer required for your business requirements.




To delete PAR

1. Go to **ADMIN SETUP > Product Administration > Attribute Rules**. The Attribute rules page is displayed
2. On the Product Attribute Rules tab, search for the PAR you want to delete and do one of the following:
 - To delete a single PAR, click the ellipsis icon () next to the PAR name, and click **Delete**.
 - To delete multiple PAR, click the checkboxes next to the name column, and click the () icon.
 - To delete all the PAR, click the checkbox in the header row next to the name column, and click the () icon.
3. Click **Confirm**.

Deleting an Attribute Value Matrix

You can delete Attribute Value Matrices (AVM) that are no longer required for your business requirements.

To delete AVM

1. Go to **ADMIN SETUP > Product Administration > Attribute Rules**. The Attribute rules page is displayed
2. On the Attribute Value Matrices tab, search for the AVM you want to delete and do one of the following:
 - To delete a single AVM, click the ellipsis icon () next to the AVM name, and click **Delete**.
 - To delete multiple AVM, click the checkboxes next to the name column, and click the () icon.
 - To delete all the AVM, click the checkbox in the header row next to the name column, and click the () icon.
3. Click **Confirm**.

Managing Field Expressions

A field expression is a predefined expression used to update record fields based on certain criteria, particularly on the line items. These expressions are managed through the CPQ Admin interface and are essential for automating and customizing the behavior of CPQ according to specific business logic. You can apply field expressions when configuring products and adding a line item to the cart. You can view a line item or attribute field update based on the criteria of a field expression on the cart page. This feature enables you to have the correct configuration while adding the products to the cart. Field expressions can be used to set standard line item fields, such as Selling Term or End Date, based on the criteria of the Line Item or product attributes. For example, if a product attribute named Term has values like 1 Year and 3 Years, a field expression can be written to set the selling term of the line item based on the selected term.

Field expressions are different from formula fields, which are used for calculating values at runtime and can impact performance, especially when used in large numbers on objects like line items. Field expressions are used to update records based on criteria, while formula fields calculate values dynamically based on other field values. While field expressions can update many fields, there are best practices to consider. For instance, using too many formula fields on line items is not advised, as they are calculated at runtime and can impact performance. Instead, using numeric expressions is suggested. The benefits of using field expressions include the ability to automate record updates based on specific criteria, which can streamline processes and reduce the need for manual updates.


Navigating the Field Expressions Page

When you launch the Field Expressions page on the UI, all the existing field expressions are listed on this page along with their details. There are various functionalities available for you to manage the field expressions.

Managing Views

You can manage column width, control which columns are displayed in the grid, freeze/pin a column range, or rearrange the column order. You can also filter the view of records in the grid by performing a keyword search, filtering the list by column value, or applying one or more advanced filters and filter logic. For more information, see [Managing the View Settings](#) and [Filtering the Records](#).

Actions available on this page

- Click **New Field Expression** to create new field expressions.
- Click the ellipsis icon  next to the field expression name to delete an existing field expression.
- Click the field expression name link to open the field expression details page.
- Export the selected field expressions. For more information, see [Exporting Records](#).

The following sections describe various operations for managing field expressions:

- [Creating a Field Expression](#)
- [Editing a Field Expression](#)
- [Deleting a Field Expression](#)

Creating a Field Expression

Create a field expression to update record fields based on certain predefined criteria and reduce the need for manual updates.


To create a field expression

1. Go to ADMIN SETUP > Product Administration > Field Expressions.
2. Click **Create New** to open a New Field Expression pop-up.
3. Enter the following details:

Field	Description
Name	Enter the name of the field expression
Is Active	Turn this button on to activate the field expression.
Is Modifiable	Turn this button on to enable editing of the field expression.
Expression Type	This field is populated by default with the value Field Update.
Expression Context	This field is populated by default with the value Record Update.

Field	Description
Source Object	This field is populated by default with the value Line Item.
Scope	<p>Select one of the following values that are displayed in the dropdown:</p> <ul style="list-style-type: none"> • Product: to apply field expression on the product line items. • Product Group: to apply field expression on the product group level. • Header Level: to apply field expression on fields at header level. <p>Based on your selection, you must select a product or product group.</p>

4. Click **Create**. A field expression is created and you are redirected to the details page.
5. Click **Expression** under **Filter Expression**, and use the formula builder to create a formula.

 For adding an expression, you can choose from three fields: Line Item, Product, and Attribute. Select any of these fields to create an expression.

- a. Go to the Field tab and search for your desired field from the list.
 - b. Click the arrow next to the field name to view and select its related child fields. The formula expression, determined by the selected object-field and/or subfield, appears on the right panel of the application.
 - c. Click Insert to add it to the expression.
 - d. Go to the Functions tab, select a function from the list, and click **Insert** to add it to the expression.
 - e. Click any operator available below the expression window to add it to the expression.
 - f. Continue building your expression.
 - g. Click **Save**.
6. In **Update Object**, select one of the following from the drop-down.
 - Product Attribute
 - Line Item
 7. In **Update Field**, select the field on which you want to apply the field expression.
 8. Click **Expression** under **Value Expression**, and refer Step 5a to Step 5g to use the formula builder to create a formula.

9. Click **Save** or click **Save & Create New**.

Editing a Field Expression

You can edit a field expression as required.




To edit a field expression

1. Go to ADMIN SETUP > Product Administration > Feature Set.
2. Click on the name of the field expression and modify it as required.
3. Click **Save**.

Deleting a Field Expression

You can delete a field expression if required.

To delete a field expression

1. Go to ADMIN SETUP> Product Administration >Field Expressions.
2. Search for the field expression and do one of the following:
 - To delete a field expression, click the ellipsis icon () next to the field expression name, and click **Delete**.
 - To delete multiple field expressions, click the checkboxes next to the name column, and click the () icon.
 - To delete all the field expressions, click the checkbox in the header row next to the name column, and click the () icon.
3. Click **Confirm**.

[Creating a Field Expression](#)

[Managing Field Expressions](#)

Managing the Feature Sets

Feature sets are collections of features that can be associated with a product to define its capabilities or specifications. They are used to organize and manage product features in a structured way, which can be particularly useful for product comparison on the catalog pages. You can define the sequence of features within a feature set. When you create a feature set in the CPQ Admin console, you can add multiple features to it. Each feature you add is assigned a sequence number that is auto-populated. If you need to rearrange the

sequence of these features, you can do so by clicking and dragging the rows to the desired order. Once you have arranged the features in the sequence you prefer, you can save the feature set, and this sequence is retained.

When a feature set is created, it must be associated with a product. The association allows for the comparison on the catalog pages.

Feature sets enable the comparison of products by allowing you to see different features side by side. This is particularly useful when products have minor differences that need to be highlighted.


Navigating the Feature Sets Page

When you launch the feature sets page on the UI, all the existing feature sets are listed on this page along with their details. There are various functionalities available for you to manage the feature sets.

Managing Views

You can manage column width, control which columns are displayed in the grid, freeze/pin a column range, or rearrange the column order. You can also filter the view of records in the grid by performing a keyword search, filtering the list by column value, or applying one or more advanced filters and filter logic. For more information, see [Managing the View Settings](#) and [Filtering the Records](#).

Actions available on this page

- Click **Create New** to create a new feature set.
- Click the ellipsis icon  next to the feature set name to edit an existing feature set.
- Click the feature set name link to open the feature set Details page.
- Export the selected feature sets. For more information, see [Exporting Records](#).

The following sections describe various operations for managing feature sets:

- [Creating a Feature Set](#)
- [Editing a Feature Set](#)
- [Deleting a Feature Set](#)

Creating a Feature Set

You can organize product features in a structured way in feature sets. To create a feature set, you must first define the feature set name and description, then define individual features within that set, including their names and descriptions. Once created, you can add multiple features to a feature set and rearrange their sequence.

To create a feature set

1. Go to ADMIN SETUP > Product Administration > Feature Sets.
2. Click **Create New** to open a New Feature Set pop-up.
3. Enter the following details:

Field	Description
Feature Set Name	Enter a name for the feature set.
Sequence	Give a sequence number to the new feature set. It should have a unique value from existing feature sets.
Description	Enter a description.

4. Click **Create**. A Feature Set is created and you are redirected to the Details tab.
5. On the Details tab, review the information and make changes if required.
6. Click the **Features** tab, and click **Add New**.
7. Enter a name and description of the feature.
8. Click **Add New** to add another feature.
9. Click **Save**.

[Managing the Feature Sets](#)

Editing a Feature Set

You can edit a feature set as required.

To edit a feature set




1. Go to ADMIN SETUP > Product Administration > Feature Set.
2. Click on the name of the feature set and modify as required.
3. Click **Save**.

[Managing the Feature Sets](#)

Deleting a Feature Set

You can delete a feature set if required.

To delete a Feature Set

1. Go to ADMIN SETUP > Product Administration > Feature Sets.
2. Search for the feature set and do one of the following:
 - To delete a feature set, click the ellipsis icon () next to the feature set name, and click **Delete**.
 - To delete multiple feature sets, click the checkboxes next to the name column, and click the () icon.
 - To delete all the feature sets, click the checkbox in the header row next to the name column, and click the () icon.
3. Click **Confirm**.

[Creating a Feature Set](#)

[Managing the Feature Sets](#)

Managing the Rollups

Roll-Up Summary Fields

A roll-up summary field is a calculated field on a master record that aggregates data from its related detail records. The types of calculations typically supported include sums, averages, minimums, and maximums, among others. These fields automatically update as the detail records change, ensuring that the summary data is always current.

Key Components

1. Master Record: The main record that displays the roll-up summary field.
2. Detail Records: The related records whose values are aggregated to populate the roll-up summary field.
3. Calculation Type: The specific type of aggregation performed, such as sum, average, min, or max.
4. Field Criteria: Conditions that detail records must meet to be included in the roll-up calculation.

Functionality

1. Automatic Updates: Roll-up summary fields are dynamically updated whenever the related detail records change, ensuring accurate and up-to-date summary data.
2. Aggregation Types:
 - a. Sum: Adds up the values of a specified field from the detail records.
 - b. Average: Calculates the average value of a specified field from the detail records.
 - c. Min/Max: Finds the minimum or maximum value of a specified field from the detail records.
 - d. AND/OR: Includes either one condition or multiple conditions.
3. Conditional Criteria: Roll-up summary fields can be configured to only include detail records that meet certain conditions, allowing for more tailored and relevant summaries.

Use Cases

1. Sales Performance: Summarize total sales amounts from individual sales transactions to provide an overall sales figure on the master sales record.
2. Inventory Management: Calculate the total quantity of items in stock by aggregating quantities from individual inventory records.
3. Customer Accounts: Display the total balance due by summing up outstanding invoices related to a customer account.
4. Project Management: Aggregate total hours worked from individual time logs to display on a master project record.

Benefits

Roll-up summary fields provide improved data visibility by offering a clear and concise view of aggregated data directly on the master record, enhancing comprehensive reporting and analysis of key metrics. They boost operational efficiency by automating calculations and updates, thus saving time and reducing errors. These fields also ensure real-time insights, enabling timely and informed decision-making.


Navigating the Rollups Page

When you launch the rollups page on the UI, all the existing rollups are listed on this page along with their details. There are various functionalities available for you to manage the rollups.

Managing Views

You can manage column width, control which columns are displayed in the grid, freeze/pin a column range, or rearrange the column order. You can also filter the view of records in the grid by performing a keyword search, filtering the list by column value, or applying one or more advanced filters and filter logic. For more information, see [Managing the View Settings](#) and [Filtering the Records](#).

Actions available on this page

- Click **Create New** to create a new rollup.
- Click the ellipsis icon  next to the rollup name to delete an existing rollup.
- Click the rollup name link to open the rollup Details page.
- Export the selected rollups. For more information, see [Exporting Records](#).

This section provides information on configuring option groups.

Refer to the following topics for more information.

- [Creating the Rollups](#)
- [Editing the Rollups](#)
- [Deleting the Rollup](#)

Creating the Rollups

To create a Rollup

1. Go to ADMIN SETUP > Product Administration > Rollups. The Rollups page is displayed.
2. Click the **Create New** button. The New Rollup page is displayed.
3. Enter the following details:

Field	Description
Rollup Name	Enter a name for the Rollup.
Is Active	Switch the toggle to on if the rollup is active.
Is Modifiable	Switch the toggle to on if the rollup can be modified.

Field	Description
Scope	This is a picklist value, where you have to choose whether the rollup belongs to the product or the product group.

4. Once the rollup is created, you can configure the rollup.

Field	Description
DETAILS	
Name	Enter a name for the Feature
Is Active	Switch the toggle to on if the rollup is active.
Is Modifiable	Switch the toggle to on if the rollup can be modified.
Scope	This is a picklist value, where you have to choose whether the rollup belongs to the product or the product group.
Product	Select the product that you want to associate the rollup with.
Filter Expression	Add the formula field.
ACTION	
Update Object	Update the object type.
Update Field	Update the field associated with the rollup.
Operator	Choose the operator value.
Value Expression	Enter the formula that needs to be calculated.

5. Click **Save** to save the updates.
6. Click **Save & Create New** to save the updates and create new Rollup.
7. Click **Discard Changes** to delete the updates

Editing the Rollups

You can edit any rollup as required. This feature enables you to make the necessary changes to the rollup configuration when the requirement changes.




To edit an rollup

1. Go to **ADMIN SETUP > Product Administration > Rollups**. The rollups page is displayed.
2. Search for the rollup you want to edit.
3. Click the rollup name. The rollup Details page is displayed.
4. Edit the required fields.
5. Click **Save**.

Deleting the Rollup

You can delete rollups that are no longer required for your business requirements.

To delete a rollup

1. Go to **ADMIN SETUP > Product Administration > Rollups**. The Rollups page is displayed.
2. Search for the rollup and do one of the following:
 - To delete a single rollup, click the ellipsis icon () next to the rollup name, and click **Delete**.
 - To delete multiple rollups, click the checkboxes next to the name column, and click the () icon.
 - To delete all the rollups, click the checkbox in the header row next to the name column, and click the () icon.
3. Click **Confirm**.

Pricing Administration

This section provides information on pricing products.

- [Managing Price Lists](#)
- [Managing Price Dimensions](#)
- [Managing Price Rulesets](#)
- [Managing Deal Guidance](#)

- [Managing Promotions](#)
- [Managing the Price Waterfall](#)

Managing Price Lists

Price lists are containers of price list items. Price lists can also have a currency set if your environment is multi-currency enabled.

Price lists are associated with categories so that an end user can view and select products from the shopping cart. For example, Price list A is associated with Category B, when you select price list A on the Quote/Proposal Edit page, only category B and associated products are displayed in the shopping cart.

You can create a price list at any time; however, it is most efficient to create a price list before creating products to easily associate the products with the price list.


Navigating the Price Lists Page

When you launch the Price Lists page on the UI, all the existing price lists are listed on this page along with their details. There are various functionalities available for you to manage the price lists.

Managing Views

You can manage column width, control which columns are displayed in the grid, freeze/pin a column range, or rearrange the column order. You can also filter the view of records in the grid by performing a keyword search, filtering the list by column value, or applying one or more advanced filters and filter logic. For more information, see [Managing the View Settings](#) and [Filtering the Records](#).

Actions available on this page

- Click **Add New** to create a new price lists.
- Click the ellipsis icon  next to a price list name to delete or clone an existing price list.
- Click the price list name link to open the Price Lists details page.
- Use the **Active** switch to activate or deactivate a price list.
- Export the selected price lists. For more information, see [Exporting Records](#).

This section provides information on managing price lists.

- [Creating a Price List](#)
- [Editing a Price List](#)
- [Cloning a Price List](#)
- [Deleting a Price List](#)
- [Managing Price List Items](#)
- [Associating Categories with a Price List](#)

Creating a Price List


You can create a price list at any time; however, it is most efficient to create a price list before creating products to easily associate the products with the price list.

To create a price list

1. Go to ADMIN SETUP > Pricing Administration > Price Lists. The Price Lists page is displayed.
2. Click **Add New**. The New Price List pop-up is displayed.
3. Enter the following details:

Field	Description
Price List Name	Enter the name for the price list. This is a mandatory field.
Active	Turn this field on to make the price list active.
Currency	Enter the currency for the price list. By default, the currency of the org is selected. This is a mandatory field.
Account	Search and select an account to be associated with the price list.
Description	Enter a description for the price list.
Effective Date	Select a date from when the price list must be effective.
Expiration Date	Select a date on which the price list must be expired or made inactive.

Field	Description
Price List Type	<p>Select the type of price list from the drop-down. Supported values are:</p> <ul style="list-style-type: none"> • Standard: Select standard price list if the quote derives its pricing from price list and its related price list items configured in CPQ. • Contract: Select contract price list if the quote derives its pricing from an agreement. You must also associate a contract number when you select this price list.
Contract Number	<p>Enter a contract number to which you want to associate this price list. This enables contract pricing in CPQ.</p>
Disable based on currency Adjustment	<p>Turn this setting on to disable currency conversion on the price list. By default, this setting is turned off.</p> <p>When this setting is enabled, CPQ ignores the currency conversion. For example, the currency of the master price list is USD [100 USD] and the child price list is based on master PL and the currency is GBP. When this setting is enabled, CPQ displays 100 GBP on the cart.</p>
Based on Price List	

Field	Description
Based on Price List Name	<p>Search and select the name of an existing price list depending on which the new price list is created.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p> This field is useful in scenarios such as your organization wants to sell the same products in different currencies or in the same currency with some discount.</p> <p>For example, your organization sells products in the United States in the USD currency. You have created a price list called USD Price List. For all products, you have created the required price list items, which are associated with USD Price List. Now you want to sell the same products in Great Britain in the GBP currency. You can create another price list with the following details:</p> <ul style="list-style-type: none"> • PriceList Name: GBP Price List • Currency: GBP - British Pound • Based On Price List: USD Price List <p>If you sell a product that costs 1 USD in the Unites States, the price of it will be converted to GBP based on the currency conversion rate defined. In this way, you can create a price list based on another price list, without creating corresponding price list items.</p> </div>
Price List Level Adjustment	

Field	Description
Adjustment Type	<p>Select the type of adjustment. Supported values are:</p> <ul style="list-style-type: none"> • % Discount: If the user applies a % discount type of adjustment, the list price is discounted by a percentage specified in the Adjustment Amount field. The new amount is stored on the cart line item. • Discount Amount: If the user applies a discount amount of adjustment, the list price is discounted by a percentage specified in the Adjustment Amount field. The new amount is stored on the cart line item. • Markup Amount: If the user applies a markup amount of adjustment, the list price is increased by the amount specified in the Amount adjustment field. The new amount is stored on the cart line item. • Price Factor: This is a multiplier. Select this and enter an amount in the Adjustment Amount field. Using this price factor, CPQ multiplies the list price on the cart. • % Markup: If the user applies a percentage markup of adjustment, the list price is increased by the percentage specified in the Amount adjustment field. The new amount is stored on the cart line item. For example, if you want to increase the price of laptops during the month of September, you can apply a markup amount or a percentage markup that adds to the List price.
Adjustment Amount	Enter a value based on the adjustment type that you have selected.

4. Click **Save**. The Price List Details page is displayed with all information you provided.
5. On the Details tab, update the details if required and click **Save**.

A price list is created and saved. You can associate products with the price list.

Editing a Price List

You can edit a price list as required when the requirement changes.


To edit a price list

1. Go to ADMIN SETUP > Pricing Administration > Price Lists. The Price Lists page with all price lists is displayed.
2. Search for the price list you want to update.
3. Click the price list name link. The Price List Details page is displayed.
4. On the Details tab, update the required fields.
5. Click **Save**.

Cloning a Price List

You can create a new price list from the existing price list using a clone option.


To clone a price list



1. Go to ADMIN SETUP > Pricing Administration > Price Lists. The Price Lists page with all price lists is displayed.
2. Search for the price list you want to clone.
3. Click the ellipsis icon  next to the product name and click **Clone**. The Clone Price List pop-up is displayed.
4. By default, the Price List Name will be *Clone-The price list name from which you have cloned* and all the field values will be similar to the cloned price list.
5. Click **Clone**.

Deleting a Price List

You can delete price lists that are no longer required for your business requirements.

To delete a price list

1. Go to **ADMIN SETUP > Pricing Administration > Price List**. The Price list page is displayed.
2. Search for the price list, and do one of the following:
 - To delete a single price list, click the ellipsis icon () next to the price list name, and click **Delete**.

- To delete multiple price lists, click the checkboxes next to the name column, and click the () icon.
 - To delete all the price lists, click the checkbox in the header row next to the name column, and click the () icon.
3. Click **Confirm**.


Managing Price List Items

Price List Items (PLIs) contain detailed pricing information about a product.

A product can be set up with one or more price list items. Each price list item includes the list price for the product including details of charges such as per unit, flat price, one time, recurring, and more. All the fields on a price list item are price related and impact the final price on the shopping cart. Each price list item represents different ways, a customer is charged for a product. For example: License fee, Implementation fee, and more. Price list items are categorized into price lists.

Navigating the Price List Items Tab on a Price List


When you launch the Price List Items tab on a price list on the UI, all the existing price list items in the price list are listed on this tab along with their details. There are various functionalities available for you to manage the price list items.

 The order of PLIs is based on the "Sequence" field, administrators must define the sequences accordingly to ensure the correct PLIs are resolved on Catalog and Pricing.




If a product has multiple price list items (PLIs) with the same charge type, the catalog page shows those products in the order of their sequences in the PLIs. The PLI with the lowest sequence number appears first on the catalog screen. When you add a product from the catalog screen, the system prioritizes the sequence defined in the PLI charge type picklist metadata to display the products in the cart grid.

Price list item search

You can narrow down the price list items using the search feature. In basic search, you can search for a price list item using keywords. For example, you can search using the name of the price list item.


1. In the **Search this list** field, enter a keyword related to your price list item name.
2. Click the search icon  or press Enter. CPQ returns all price list items that contain that keyword in the price list item names.

Actions available on this tab

- Click the available products icon  on the right side panel to add Products to configure price list items.
- Click the ellipsis icon  next to a price list item name to add a charge type to a product, add a charge type criteria, or remove an existing price list item.
- Click the advanced setup icon  next to a price list item name to add configure advanced settings for an existing price list item.
- Click the product name link to open the product details page.
- Update the following details in a price list item:
 - Charge Type
 - List Price
 - Price Type
 - Frequency
 - Price Method
- Use the **Active** switch to activate or deactivate a price list item.
- Discard any changes you performed to the price list items.
- Save any changes you performed to the price list items.

Adding Charge Types to a Product


To add a charge type to a product

1. Go to ADMIN SETUP > Pricing Administration > Price Lists. The Price Lists page is displayed.
2. Click the required price list name link to open the Price Lists details page.
3. Click the Price List Items tab.
4. Search for the product to which you want to add a charge type.
5. Click the ellipsis icon  next to a product name and click **Add Charge Type**. A new charge type is added for the selected product. Multiple charge types for the same price list are together.

To remove a charge type from a product




You must remove the price list item to remove a charge type.

1. Go to ADMIN SETUP > Pricing Administration > Price Lists. The Price Lists page is displayed.
2. Click the required price list name link to open the Price Lists details page.

3. Click the Price List Items tab.
4. Search for the product from which you want to delete a charge type.
5. Click the ellipsis icon  next to a product name and click **Remove** to delete an existing price list item.
 - If there are any unsaved changes, the Editing item(s) in Price List Items pop-up is displayed. Click **Discard Changes**. The Delete Price List Item pop-up is displayed. Click **Delete**.
 - If there are no unsaved changes, the Delete Price List Item pop-up is displayed. Click **Delete**.

Adding Charge Type Criteria to a Product




To add a charge type criteria to a product

1. Go to ADMIN SETUP > Pricing Administration > Price Lists. The Price Lists page is displayed.
2. Click the required price list name link to open the Price Lists details page.
3. Click the Price List Items tab.
4. Search for the product to which you want to add a charge type criteria.
5. Click the ellipsis icon  next to a product name and click **Charge Type Criteria**. The Charge Type Criteria pop-up is displayed.
6. On the Line Items tab, enter the following details:
 - a. **Field**: Select a field on the product. You can select custom fields also.
 - b. **Operator**: Select an operator.
 - c. **Value**: Enter a value.
 - d. Click **Add Criteria** to add one more criteria.
 - e. Click the remove icon  to remove a criteria.
 - f. Click **Remove All** to remove all criteria.
 - g. Turn the **Logic** button on and enter a value in the **Logic** field when you add multiple criteria.
 - h. Click **Save**.
7. On the Product Attributes tab, enter the following details:
 - a. **Field**: Select a field on the product. You can select custom fields also.
 - b. **Operator**: Select an operator.
 - c. **Value**: Enter a value.
 - d. Click **Add Criteria** to add one more criteria.
 - e. Click the remove icon  to remove a criteria.
 - f. Click **Remove All** to remove all criteria.

- g. Turn the **Logic** button on and enter a value in the **Logic** field when you add multiple criteria.
 - h. Click **Save**.
8. Click **Save** on the Price List Items tab.

To remove a charge type criteria from a product


You must remove the price list item to remove a charge type.



1. Go to ADMIN SETUP > Pricing Administration > Price Lists. The Price Lists page is displayed.
2. Click the required price list name link to open the Price Lists details page.
3. Click the Price List Items tab.
4. Search for the product from which you want to remove a charge type criteria.
5. Click the ellipsis icon  next to a product name and click **Charge Type Criteria**. The Charge Type Criteria pop-up is displayed.
6. On the Line Items tab, click the remove icon  to remove a criteria and click **Save**.
7. On the Product Attributes tab, click the remove icon  to remove a criteria and click **Save**.
8. Click **Save** on the Price List Items tab.

Creating a Price List Item

This section provides information on creating a price list item for a product from a price list. You can associate more than one product to the price list and create price list items for those products.

To create a price list item

1. Go to ADMIN SETUP > Pricing Administration > Price Lists. The Price Lists page is displayed.
2. Click the required price list name link to open the Price Lists details page.
3. Click the Price List Items tab. Under Available Products, you can see all products available in the org.
4. In the **Search Products** field, enter keywords to search the product you want to associate with the price list and click the search icon  or press Enter.
5. Hover the mouse on the required product and click + next to the product name. A price list item is created for the product with default values and is displayed in the Price List Items section (right-hand side).

 Hover the mouse on the required product and click the  icon next to the product name to display more information about the product.

6. Enter the following details:

a. From the **Charge Type** drop-down, select the required charge type for the product. The default value is the default charge type of the org. Supported values are:

- Standard Price
- License Fee
- Subscription Fee
- Implementation Fee
- Installation Fee
- Adjustment
- Service Fee
- Rental Price
- Sales Price
- Usage Fee
- Consulting Fee

b. In the **List Price** field, enter a list price for the product. The default value is 0 (zero).

c. From the **Price Type** drop-down, select the price type. Supported values are:

- One Time (default value)
- Recurring
- Usage




- If the Price Type is Usage on a price line item(PLI), the Matrix Type should also be Usage while creating a price matrix. CPQ supports only this combination.
- You will be forced to provide the frequency if it's Price Type is Recurring or Usage so that you can have the frequency defined.

d. From the **Frequency** drop-down, select the frequency for the product. Supported values are:


- Hourly
- Daily
- Monthly
- Quarterly
- Half Yearly
- Yearly
- Weekly

e. From the **Price Method** drop-down, select the price method for the product. Supported values are:

- Per Unit (default value)
 - Flat Price
 - Percentage
 - Related Price
 - Tiered Price
- f. The **Active** switch for the price list item is turned on by default.
7. Click **Save**.

 Clicking the product name link under the Price List Items section redirects you to the product details page.

To delete a price list item


1. Go to ADMIN SETUP > Pricing Administration > Price Lists. The Price Lists page is displayed.
2. Click the required price list name link to open the Price Lists details page.
3. Click the Price List Items tab.
4. In the Price List Items section, search for the price list item you want to delete.
5. Click the ellipsis icon  next to a product name and click **Remove** to delete an existing price list item.
 - If there are any unsaved changes, the Editing item(s) in Price List Items pop-up is displayed. Click **Discard Changes**. The Delete Price List Item pop-up is displayed. Click **Delete**.
 - If there are no unsaved changes, the Delete Price List Item pop-up is displayed. Click **Delete**.



Adding Default Pricing to a Product

You can apply default pricing to a product from the Defaults tab. This tab enables you to apply default quantity and pricing to a product.




To apply default pricing to a product

You must have an existing price list item.

1. Go to ADMIN SETUP > Pricing Administration > Price Lists. The Price Lists page is displayed.
2. Click the required price list name link to open the Price Lists details page.
3. Click the Price List Items tab.
4. Click the advanced setup icon  next to a price list item name. The price list item details page is displayed.
5. On the Defaults tab, enter the following details:


Field	Description
QUANTITY	
Default Quantity From	<p>Select an option from where default quantity is to be considered. If the price list item derives its default quantity from a specific attribute, when the user navigates to the catalog page and selects a product and its attribute, the default quantity of the product is derived based on a number selected from an attribute of type picklist or number. Supported values are:</p> <ul style="list-style-type: none"> • Product Configuration • Product Attribute • Advanced Formula <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> Advanced Formula is not supported in July '23.</p> </div>
Default Quantity Field	This field is dependent on the Default Quantity From field. Select a default quantity field.
Default Quantity	Enter the default quantity.
Is Quantity Read Only	Select this to make the Quantity field non-editable on the cart.
PRICE	
Default Price From	<p>Select an option from where default price can be considered. Supported values are:</p> <ul style="list-style-type: none"> • Advanced Formula <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> Advanced Formula is not supported in July '23.</p> </div> <ul style="list-style-type: none"> • Product Attribute
Default Price Field	This field is dependent on the Default Price From field. Search and select a default price field.
SELLING TERM	

Field	Description
Default Selling Term	<p>Enter the default selling term.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>i If a product has two PLIs of <i>Recurring</i> type and PLI 1 has Default Selling Term mentioned on it while PLI 2 does not have Default Selling Term, then on product configuration, the selling term of PLI 2 gets auto-updated in line with the selling term of PLI 1.</p> <p>When Price Type = Recurring, CPQ calculates the selling term on the cart as follows:</p> <ul style="list-style-type: none"> • If you provide the Default Selling Term (but the cart line item does not have start date and end date), CPQ calculates the selling term based on the default selling term. • If the cart line item has start date and end date (but you do not provide the Default Selling Term), CPQ calculates the selling term based on the start date and end date. • If you provide the default selling term and the cart line item also has start date and end date, CPQ gives precedence to the start and end dates, and calculates the selling term accordingly. </div>
Is Selling Term Read Only	Select this to make the Selling Term field non-editable on the cart.
CASCADE	
Auto Cascade Quantity	Select to automatically cascade quantity.
Auto Cascade Selling Term	<p>Select to automatically cascade selling term.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>i Suppose you have one bundle with two options. Option 1 has Auto Cascade Selling Term set to False. Option 2 has Auto Cascade Selling Term set to True. If you change the bundle selling term, it will only cascade to Option 2, but not Option 1.</p> </div>
AUTO RENEW	


Field	Description
Auto Renew	 Do not use this field in June '23.
Auto Renewal Type	 Do not use this field in June '23.
Auto Renewal Term	 Do not use this field in June '23.


6. Click **Save** before you navigate away from this tab. Otherwise, CPQ displays an error message.

Adding Details to a Price List Item

1. Go to the Price Lists page (ADMIN SETUP > Pricing Administration > Price Lists).
2. Click a price list name link to open the Price List Details page.
3. Click the **Price List Items** tab.
4. Click the advanced setup icon () next to a price list item name. The price list item details page is displayed.
5. Select the **Details** tab and enter the following details:

Field	Description
DETAILS	
Charge Type	Select a charge type. These are a separate, identifiable element of charges that can be used for pricing. For example: Standard Price, Maintenance Fee, Installation Fee, and more.
Active	Turn the setting on to make the price list item active.

Field	Description
Charge Type Criteria	<p>Configure charge type criteria.</p> <p>This is used for conditional charge types that are included only if a certain criterion is met and as part of adding the main product to the cart. Define this criterion against a Line Item or Attribute field value to apply the price list item when the criterion is satisfied. For example, this may be a charge type based on workstations, while the product may have a charge type based on users.</p> <div data-bbox="694 689 1426 1093" style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p> A product must have at least one price list item without any charge type criteria to be priced in the cart.</p> <p>If you are using the Charge Type Criteria setting, you must define a criterion for all PLIs (Price List Items). Do not define that same criterion for more than one PLI. Criteria must be mutually exclusive so that CPQ does not apply two PLIs while pricing a product.</p> </div>
List Price	Enter a list price for a product in the price list item. If the price list item has matrices or may be overridden, enter 0 or null as the list price.
Cost	Enter the product's cost.
Effective Date	Enter an effective date for the price list item.
Expiration Date	Enter an expiry date for the price list item.
Price Type	Select One Time , Recurring , or Usage . Selecting Recurring or Usage enables the Frequency field. For instance, to add a subscription product, choose Recurring as the type and then specify the frequency as monthly, yearly, and so on.

Field	Description
<p>Price Method</p>	<p>Select one of:</p> <ul style="list-style-type: none"> • Per Unit: Multiplies the price by the quantity. • Flat Price: Applies a flat price. • Percentage: Enables the Percent, Percent Applies To, and Related Price List Item fields. • Related Price: Used when the price is calculated as a function of the price of other lines in the same shopping cart. • Tiered Rate: Default price method for the Usage price type. <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p> If you selected Usage in the Price Type field, select Tiered Rate here. CPQ does not prevent you from creating other combinations, but you might not get appropriate results.</p> </div>
<p>Frequency</p>	<p>If your Price Type field selection is Recurring or Usage, select an option to indicate how often the product shall be charged.</p>


Field	Description
Filter Expression	<p>This field appears when you select Price Method as Related Pricing. Filter expression allows you to define the related adjustment amount source as a dynamic value using expressions within the line item context.</p> <ol style="list-style-type: none"> a. Click Expression define the adjustment amount on related pricing as an expression to have a dynamic adjustment value. b. Go to the Field tab and search for your desired field from the list. Click the arrow next to the field name to view and select its related child fields. The formula expression, determined by the selected object-field and/or subfield, appears on the right panel of the formula builder. c. Click Insert to add it to the expression. d. Go to the Functions tab, select a function from the list, and click Insert to add it to the expression. e. Click any operator available below the expression window to add it to the expression. f. Continue building your expression. g. Click Clear to remove the entire expression, or manually remove it by pressing the Backspace key. h. Click Validate to check your formula. The application verifies the formula and displays a confirmation message if it is valid. If the formula is invalid, an error message is displayed. i. Click Save.

Field	Description								
<p>Related Adjustment Applies To</p>	<p>Enable this field to add the Related Price List Item value.</p> <p>Enter the number of rows add, and click Add button.</p> <p>If you selected Related Price in the Price Method field, select one of Base Extended Price, Base Price, Extended Price, List Price, Net Price, or Net Unit Price to indicate which prices shall be adjusted by the related price.</p> <table border="1" data-bbox="692 618 1426 1865"> <thead> <tr> <th data-bbox="692 618 952 705">Field</th> <th data-bbox="952 618 1426 705">Description</th> </tr> </thead> <tbody> <tr> <td data-bbox="692 705 952 1547"> <p>Relation To</p> </td> <td data-bbox="952 705 1426 1547"> <p>Define the entity the related adjustment applies to. Select one of:</p> <ul style="list-style-type: none"> • Price List Item: Show all PLIs for returned price lists with both Product Name and Charge Type values. • Product: Show all products in the Related Item. • Product Family: Show all product families in the Related Item. • Product Group: Show all product groups in the Related Item. • Line Item Fields: Show all line item fields in the Related Item. </td> </tr> <tr> <td data-bbox="692 1547 952 1675"> <p>Related Item</p> </td> <td data-bbox="952 1547 1426 1675"> <p>Select the related item to associate it to the related price.</p> </td> </tr> <tr> <td data-bbox="692 1675 952 1865"> <p>Charge Type</p> </td> <td data-bbox="952 1675 1426 1865"> <p>Select the charge type for the related price. (If the Relation To value is Price List Item, this field is predefined and non-editable.)</p> </td> </tr> </tbody> </table>	Field	Description	<p>Relation To</p>	<p>Define the entity the related adjustment applies to. Select one of:</p> <ul style="list-style-type: none"> • Price List Item: Show all PLIs for returned price lists with both Product Name and Charge Type values. • Product: Show all products in the Related Item. • Product Family: Show all product families in the Related Item. • Product Group: Show all product groups in the Related Item. • Line Item Fields: Show all line item fields in the Related Item. 	<p>Related Item</p>	<p>Select the related item to associate it to the related price.</p>	<p>Charge Type</p>	<p>Select the charge type for the related price. (If the Relation To value is Price List Item, this field is predefined and non-editable.)</p>
Field	Description								
<p>Relation To</p>	<p>Define the entity the related adjustment applies to. Select one of:</p> <ul style="list-style-type: none"> • Price List Item: Show all PLIs for returned price lists with both Product Name and Charge Type values. • Product: Show all products in the Related Item. • Product Family: Show all product families in the Related Item. • Product Group: Show all product groups in the Related Item. • Line Item Fields: Show all line item fields in the Related Item. 								
<p>Related Item</p>	<p>Select the related item to associate it to the related price.</p>								
<p>Charge Type</p>	<p>Select the charge type for the related price. (If the Relation To value is Price List Item, this field is predefined and non-editable.)</p>								

Field	Description	
	Field	Description
	Adjustment Amount	Enter the adjustment amount.
	Adjustment Type	Select the adjustment type.
	Related Item Value	You can add a value to this field only if you selected Relation To as Line item field. (For example: If the Related Item field's value is Quantity, then you can specify that quantity here.)
To delete a row, click the more icon and select Remove .		

6. Click **Save** before you leave this tab.

Adding Miscellaneous Settings to a Price List Item

1. Go to ADMIN SETUP > Pricing Administration > Price Lists. The Price Lists page is displayed.
2. Click the required price list name link to open the Price Lists details page.
3. Click the Price List Items tab.
4. Click the advanced setup icon  next to a price list item name. The price list item details page is displayed.
5. On the Miscellaneous tab, enter the following details:

Setting	Description
Price Included In Bundle	Select to include the price with the bundle product. Selecting Price Included in Bundle sets the Adjustment Amount to zero and Adjustment Type to Price Override. This means the option price is included in the bundle price and therefore is free.
Enable Price Ramps	Select this check box to make a product price rampable.

Setting	Description
Allow Manual Adjustments	Select this to enable the end user to make manual adjustments. Manual adjustments are done through the adjustment type and amount fields on the pricing cart page.
Allocate Group Adjustment	Select this to include the product in a manual group discount, if applied, on the pricing cart page.
Enable Commitment	Select this to enable commitment.
Allow Proration	Select to allow proration. On the Cart page, to make Selling Frequency editable by the user, this check box must be selected.
Is Usage Tier Modifiable	Select this check box to enable an end user to modify the usage tier.
Disable Sync With Opportunity	Select to prevent the creation of asset corresponding to this product during the quote process. For now, you can disable asset creation only for standalone products. It is recommended not to block asset creation because it hinders the preferable system flow of asset creation on quote acceptance.
Disable Asset Integration	Select to prevent the creation of asset corresponding to this product during the quote process. For now, you can disable asset creation only for standalone products.
Enable Price Overlap	Select this to enable price overlap.

- Click **Save** before you navigate away from this tab. Otherwise, CPQ displays an error message.

Configuring Price Escalators

Price Escalator is a new mechanism to define a markup on the different prices for a product. The markup can be defined on a previous or first ramp line on the cart.

On which prices is it applicable?

The markup is applied on the List Price, Base Price or Extended Price.

Applicable for which products?

The Price Escalator can be applied on Bundle and Option products. Please note that the bundle level escalator does not cascade to the option products.

Where is this applied?

The markup is applied on the first or previous ramp line (defined by the **Period** field) of bundle or option products on the cart.

When is this applied?

For bundle products, the price escalator is applied after the Price Matrices.

For option products, the price of the ramps is calculated depending on the value in the **Product Option Price Order** field.

✔ Usecase

If the matrix gives a base price is 60 and if the YOY ramp markup has been defined as 10% over base price on period 2 and period 3, then the first ramp line will be \$60, second will be \$66 and the third will be \$72.60.

How is price escalator applied on ramp lines during ABO operations?


CPQ applies Price Escalator on new ramp lines created during ABO operations regardless of the **Default Asset Pricing Indicator?** setting (true or false). A new ramp line always gets its value from the price list item (PLI) pricing. For more information, see Use Case: Applying Price Escalator on New Ramp Lines During ABO Operations.


To configure a Price Escalator

1. Navigate to your Price List Item record and search for **Price Escalator** related list.
2. Click **New Price Escalator** and enter the following details:

Field	Description
Period Number	Defines the ramp line number.
Adjustment Source	Defines the ramp on which the adjustment is applied. For example, Previous Ramp (if the ramp value depends on its previous value) or, the First Ramp (if the ramp value depends first ramp).

Field	Description
Adjustment Applies To	Values for the different prices to which the adjustment is applied. Valid values are List Price, Base Price and Extended Price.
Adjustment Type	Values for manual adjustments whether you want to apply discount or markup on the price.
Adjustment Amount	Field to enter in the amount or percentage of manual adjustment.
Price List Item	This is a lookup to the Price List Item, containing the PLI Id by default.

- Turn the setting **Copy the current data in new row** on to copy the details of a price matrix entry to the next entry.
- In the **Number of rows** field, enter a value of how many rows you want to add.
- Click the ellipsis icon  for the entry and click **Delete**.
 - If there are no unsaved changes, the Delete Price Matrix Entry pop-up is displayed. Click **Confirm**.
 - If there are unsaved changes, the a pop-up is displayed prompting your confirmation. Click Discard Changes. The Delete Price Matrix Entry pop-up is displayed. Click **Confirm**.
- Click **Add**.


 The price escalators will be sorted according to the Period Number.

Configuring Price Matrices

Matrices Search

You can narrow down the matrices list using the search feature. You can either define search criteria to search for a range of matrices or use the matrices search option.

You can search for a matrices using keywords. For example, you can search using the name of the matrix.

- In the **Search this list** field, enter a keyword related to your matrix details such as matrix name.
- Click the search icon  or press Enter. CPQ returns all matrices that contain that keyword in the matrices names.




Sorting Matrices

You can sort the matrices list by clicking the column names. The matrices are sorted alphabetically in ascending order using the matrix name. Every time you click the column name, the sorting switches between ascending and descending order. You can adjust the column width by dragging the columns. Hover near the column boundaries till two-way arrow appears. Click when the arrow appears and drag left or right to adjust the column width.

Items per page

At the bottom of the page, you can see the total count of matrices available. You can control the number of matrices to be displayed on each page. You can select the number of matrices from a predefined list. You cannot configure this list. By default, you see 20 records on each page.

By default, you can sort 10, 20, 30, 50, and 100 matrices per page using the **Rows per page** drop-down. This feature works in association with the search and filter functions to display search records per page. You can use the < and > buttons to move to the next or the previous pages. You can also jump to a certain page using the page search component.

1. Go to ADMIN SETUP > Pricing Administration > Price Lists. The Price Lists page is displayed.
2. Click the required price list name link to open the Price Lists details page.
3. Click the Price List Items tab.
4. Click the advanced setup icon  next to a price list item name. The price list item details page is displayed.
5. Click the Metrics tab.
 - If there are existing metrics, you can perform the following actions on the list of metrics:
 - i. Click **Create New**. The Create New Matrix pop-up is displayed. Go to Step 6.
 - ii. Click the required price matrix name link to open the price matrix details page. You can create price matrix entries. For more information, see [Configuring Price Matrix Entries](#).
 - iii. Rearrange the sequence of matrices using the  icon.
 - iv. Click the ellipsis icon  for the matrix and click **Delete**.
 - If there are no unsaved changes, the Delete Price Matrix pop-up is displayed. Click **Confirm**.
 - If there are unsaved changes, the a pop-up is displayed prompting your confirmation. Click **Discard Changes**. The Delete Price Matrix pop-up is displayed. Click **Confirm**.
 - If there are no metrics created, click **Create New** on the required matrix type.

- i. Dimension: You can enter a maximum of six dimensions, which bring in attributes from the line items or headers of any data type within the Conga Platform to be used in pricing.
- ii. Condition: You can create conditions using multiple fields of a line item or product attribute with Boolean logic such as AND/OR.
- iii. Usage: If the **Price Type** is "Usage" on a price line item, the **Matrix Type** should also be "Usage" while creating a price matrix. CPQ supports only this combination.


The Create New Matrix pop-up is displayed.


6. Enter the following details:

Setting	Description
Matrix Name	Enter a name for the matrix.
Sequence	Enter a sequence number for the matrix.
Description	Enter a description for the matrix.
Enable Date Range	Turn this setting on to enable the start and end date for price matrix to execute. If you enable this, you must enter Start Date and End Date while creating price matrix entries.
Stop Processing More Matrices	Turn this setting on to stop CPQ from evaluating further matrices if a match is found within this matrix.
Select Matrix Type	Select a matrix type. Supported values are: <ul style="list-style-type: none"> • Dimension • Condition • Usage

7. Enter the following details under the Dimensions section if you select Dimension under **Select Matrix Type**.


- a. **Dimension:** Select a dimension.

 When you hover over the info icon beside *Dimension Name*, it will show the basic information in a pop-up. If you click *more info*, it will navigate you to the respective dimension.

- b. **Dimension Value:** Select a value for the dimension. Supported values are:
 - Discrete
 - Range
 - Cumulative Range
 - Weighted Range
 - Cumulative Range - Line Item
 - c. Click **Add Dimension** to add a dimension. You can select a maximum of six dimensions.
 - d. Click the delete icon  to delete a dimension. If there is only one dimension, you cannot delete it.
8. Click **Save**.



Configuring Price Matrix Entries

Dimension




1. Go to ADMIN SETUP > Pricing Administration > Price Lists. The Price Lists page is displayed.
2. Click the required price list name link to open the Price Lists details page.
3. Click the Price List Items tab.
4. Click the advanced setup icon  next to a price list item name. The price list item details page is displayed.
5. Click the Metrics tab. The list of existing metrics is displayed.
6. Click the required price matrix name link (Dimension type matrix) to open the price matrix details page.
7. On the Entries tab, click **Add**. A price matrix entry is added.
8. Enter the following details:

Setting	Description
Start Date	This field is visible only if you turn the Enable Date Range setting on while creating the price matrix. Select a start date for the matrix entry. It is a mandatory field.
End Date	This field is visible only if you turn the Enable Date Range setting on while creating the price matrix. Select an end date for the matrix entry. It is a mandatory field.
Adjustment Amount	Enter a percentage or a number to adjust the price.

Setting	Description
Adjustment Type	Select the kind of adjustment required if the criteria is met. For example, an override to a list price, markup, or discount.
Adjustment Amount Source	Search and select a field from where the adjustment must be sourced.



9. Click Formula Builder icon  to define the adjustment amount on Matrices rule entry as an expression to have a dynamic adjustment value.
 - a. Go to the Field tab and search for your desired field from the list. Click the arrow next to the field name to view and select its related child fields. The formula expression, determined by the selected object-field and/or subfield, appears on the right panel of the formula builder.
 - b. Click Insert to add it to the expression.
 - c. Go to the Functions tab, select a function from the list, and click **Insert** to add it to the expression.
 - d. Click any operator available below the expression window to add it to the expression.
 - e. Continue building your expression.
 - f. Click **Clear** to remove the entire expression, or manually remove it by pressing the Backspace key.
 - g. Click **Validate** to check your formula. The application verifies the formula and displays a confirmation message if it is valid. If the formula is invalid, an error message is displayed.
 - h. Click **Save**.
10. Turn the setting **Copy the current data in new row** on to copy the details of a price matrix entry to the next entry.
11. In the **Number of rows** field, enter a value of how many rows you want to add.
12. Click the ellipsis icon  for the entry and click **Delete**.
 - If there are no unsaved changes, the Delete Price Matrix Entry pop-up is displayed. Click **Confirm**.
 - If there are unsaved changes, the a pop-up is displayed prompting your confirmation. Click Discard Changes. The Delete Price Matrix Entry pop-up is displayed. Click **Confirm**.
13. Click **Save**.

Condition

1. Go to ADMIN SETUP > Pricing Administration > Price Lists. The Price Lists page is displayed.
2. Click the required price list name link to open the Price Lists details page.
3. Click the Price List Items tab.
4. Click the advanced setup icon  next to a price list item name. The price list item details page is displayed.
5. Click the Metrics tab. The list of existing metrics is displayed.
6. Click the required price matrix name link (condition type matrix) to open the price matrix details page.
7. On the Entries tab, click **Add**. A price matrix entry is added.
8. Click **Add Condition**. The Charge Type Criteria pop-up is displayed.
 - a. On the Line Items tab, enter the following details:
 - i. **Field**: Select a field on the product. You can select custom fields also.
 - ii. **Operator**: Select an operator.
 - iii. **Value**: Enter a value.
 - iv. Click **Add Criteria** to add one more criteria.
 - v. Click the remove icon  to remove a criteria.
 - vi. Click **Remove All** to remove all criteria
 - vii. Turn the **Logic** button on and enter a value in the **Logic** field when you add multiple criteria.
 - viii. Click **Save**.
 - b. On the Product Attributes tab, enter the following details:
 - i. **Field**: Select a field on the product. You can select custom fields also.
 - ii. **Operator**: Select an operator.
 - iii. **Value**: Enter a value.
 - iv. Click **Add Criteria** to add one more criteria.
 - v. Click the remove icon  to remove a criteria.
 - vi. Click **Remove All** to remove all criteria.
 - vii. Turn the **Logic** button on and enter a value in the **Logic** field when you add multiple criteria.
 - viii. Click **Save**.
9. Enter the following details:

Setting	Description
Start Date	This field is visible only if you turn the Enable Date Range setting on while creating the price matrix. Select a start date for the matrix entry. It is a mandatory field.


Setting	Description
End Date	This field is visible only if you turn the Enable Date Range setting on while creating the price matrix. Select an end date for the matrix entry. It is a mandatory field.
Adjustment Amount	Enter a percentage or a number to adjust the price.
Adjustment Type	Select the kind of adjustment required if the criteria is met. For example, an override to a list price, markup, or discount.
Adjustment Amount Source	Search and select a field from where the adjustment must be sourced.


10. Click Formula Builder icon  to define the adjustment amount on Matrices rule entry as an expression to have a dynamic adjustment value.
 - a. Go to the Field tab and search for your desired field from the list. Click the arrow next to the field name to view and select its related child fields. The formula expression, determined by the selected object-field and/or subfield, appears on the right panel of the formula builder.
 - b. Click Insert to add it to the expression.
 - c. Go to the Functions tab, select a function from the list, and click **Insert** to add it to the expression.
 - d. Click any operator available below the expression window to add it to the expression.
 - e. Continue building your expression.
 - f. Click **Clear** to remove the entire expression, or manually remove it by pressing the Backspace key.
 - g. Click **Validate** to check your formula. The application verifies the formula and displays a confirmation message if it is valid. If the formula is invalid, an error message is displayed.
 - h. Click **Save**.
11. Turn the setting **Copy the current data in new row** on to copy the details of a price matrix entry to the next entry.
12. In the **Number of rows** field, enter a value of how many rows you want to add.
13. Click the ellipsis icon  for the entry and click **Delete**.

- If there are no unsaved changes, the Delete Price Matrix Entry pop-up is displayed. Click **Confirm**.
- If there are unsaved changes, the a pop-up is displayed prompting your confirmation. Click Discard Changes. The Delete Price Matrix Entry pop-up is displayed. Click **Confirm**.

14. Click **Save**.


Usage

 For Usage type price matrix entries, either Unit Price or Flat Price is required, not both.

1. Go to ADMIN SETUP > Pricing Administration > Price Lists. The Price Lists page is displayed.
2. Click the required price list name link to open the Price Lists details page.
3. Click the Price List Items tab.
4. Click the advanced setup icon  next to a price list item name. The price list item details page is displayed.
5. Click the Metrics tab. The list of existing metrics is displayed.
6. Click the required price matrix name link (usage type matrix) to open the price matrix details page.
7. On the Entries tab, click **Add**. A price matrix entry is added.
8. Enter the following details:

Setting	Description
From	Enter a value.
To	Enter a value.
Start Date	This field is visible only if you turn the Enable Date Range setting on while creating the price matrix. Select a start date for the matrix entry. It is a mandatory field.
EndDate	This field is visible only if you turn the Enable Date Range setting on while creating the price matrix. Select an end date for the matrix entry. It is a mandatory field.


Setting	Description
Unit Price	Enter a unit price. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> ⓘ If you enter Unit Price, do not enter Flat Price. </div>
Flat Price	Enter a flat price. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> ⓘ If you enter Flat Price, do not enter Unit Price. </div>
Is Included	Turn this setting on to indicate if the entry is included.



9. Turn the setting **Copy the current data in new row** on to copy the details of a price matrix entry to the next entry.
10. In the **Number of rows** field, enter a value of how many rows you want to add.
11. Click the ellipsis icon  for the entry and click **Delete**.
 - If there are no unsaved changes, the Delete Price Matrix Entry pop-up is displayed. Click **Confirm**.
 - If there are unsaved changes, the a pop-up is displayed prompting your confirmation. Click **Discard Changes**. The Delete Price Matrix Entry pop-up is displayed. Click **Confirm**.
12. Click **Save**.

Associating Categories with a Price List

You can associate more than one categories with a price List.

1. Go to Admin Setup > Pricing Administration > Price Lists. The Price Lists page is displayed.
2. Search for the price list you want to associate a category with. Click the Price List.
3. On the Price List details page, click the Associated Categories tab. Under Available Categories, you can see all categories available in the org.
4. In the **Search Categories** field, enter keywords to search the category you want to associate with the price list.
5. Hover the mouse on the required category and click + next to the category name. The category is associated to the price list and is displayed in the categories list section (right-hand side).

- Hover the mouse on a parent category and click the  icon next to the category name to view category hierarchy before associating to the price list.
- Reorder the Associated Categories under Pricelists on the Admin UI, and the changes will reflect in the same sequence on the Catalog page in Runtime UI. The sequence updates automatically when categories are reordered or deleted.

6. Use the sequence () icon to reorder the associated category up and down in the category hierarchy.
7. To delete an associated category from the product:
 - a. Click the ellipsis icon  next to the required category under **Category Name** in the categories list (right-hand side).
 - b. Click **Remove**.
8. Under **Category Name** in the categories list (right-hand side):
 - a. Click the category name link. The category details pop-up is displayed. You can see the category details, associated products, and associated price lists.
 - b. Click **Close**.

Managing Price Dimensions

Price dimensions are an important concept to link any field into the pricing tables. Any field that will determine a pricing adjustment such as Quantity, Term, and more, needs a dimension created for it.


Navigating the Price Dimensions Page

When you launch the Price Dimensions page on the UI, all the existing price dimensions are listed on this page along with their details. There are various functionalities available for you to manage the price dimensions.

Managing Views

You can manage column width, control which columns are displayed in the grid, freeze/pin a column range, or rearrange the column order. You can also filter the view of records in the grid by performing a keyword search, filtering the list by column value, or applying one or more advanced filters and filter logic. For more information, see [Managing the View Settings](#) and [Filtering the Records](#).

Actions available on this page

- Click **Create New** to create a new price dimensions.
- Click the ellipsis icon  next to a price dimension name to edit or delete an existing price dimension.
- Click the price dimension name link to open the Price Dimension details page.
- Export the selected price dimensions. For more information, see [Exporting Records](#).

This section provides information on managing price dimensions.

- [Creating a Price Dimension](#)
- [Cloning a Price Dimension](#)
- [Deleting a Price Dimension](#)

Creating a Price Dimension

Price Dimensions are an important concept to link any field into the pricing tables. Any field that will determine a pricing adjustment such as Quantity, Term, and more, needs a dimension created for it.

To create a price dimension

1. Go to ADMIN SETUP > Pricing Administration > Price Dimensions. The Price Dimensions page is displayed.
2. Click **Create New**. The New Dimension page is displayed.
3. Select the **Context Type** drop-down, select a context type:

Field Name	Description
Context Type <i>(Mandatory)</i>	Select the context type for the dimension from the following: <ul style="list-style-type: none"> • Line Item • Product Attribute • Custom

Field Name	Description
	<p>If Context Type is Line Item, it allows you to choose any field on the line item shopping cart. When you select this context type, the following fields are enabled:</p> <ul style="list-style-type: none"> a. Field (Mandatory): Search and select a line item field. b. Cumulative Dimension: If you want to use a value from another dimension with the current dimension and use the resultant value as the final value, select a dimension name from the Cumulative Dimension drop-down. CPQ adds the value from another dimension to the value of the current dimension during evaluation. The cumulative dimension works only if line item field type is a number or currency. c. Relation Type : Select a relation type between the context type and the line item field. The supported value is Related Quantity.
	<p>If Context Type is Attribute, it allows you to select any product attribute that is associated to a product through an attribute group. When you select this context type, the following fields are enabled:</p> <ul style="list-style-type: none"> a. Attribute Group (Mandatory) : Search and select an attribute group b. Attribute (Mandatory) : Select an attribute in the attribute group selected above. c. Type: Select one of the types of price dimensions.
	<p>If Context Type is Custom, it allows you to provide a dimension field manually for defining lookup fields using dot notation. When selecting this context type, the following fields are enabled:</p> <ul style="list-style-type: none"> a. Field (Mandatory): Search and select a line item field. b. Type: Select one of the types of price dimensions.

4. In the **Price Dimension Name** field, enter a name for the dimension.
5. In the **Description** field, enter a description for the price dimension.
6. From the **Type** drop-down, select one of the following types of price dimensions:


Type	Description
Standard	Select this for a standard price dimension.
Quantity	Select this if the price dimension is based on quantity.
Term	Select this if the price dimension is based on term.
Amount	Select this if the price dimension is based on purchase amount.
Equipment	Select this if the price dimension is based on equipment.


7. Click **Save** to save the price dimension or click **Save & Create New** to save and create a new price dimension.

Cloning a Price Dimension

Cloning price dimensions allows pricing administrators to copy existing price settings, making it easier to create and manage similar pricing structures quickly.

To clone a price dimension

1. Go to ADMIN SETUP > Pricing Administration > Price Dimensions. The Price Dimensions page is displayed.
2. Search for the price dimension you want to clone.
3. Click the ellipsis icon  next to the product name and click **Clone**. The Clone Price Dimension page is displayed.
4. Enter the details:

Field Name	Description
Context Type (Mandatory)	<p>Select the context type for the dimension from the following:</p> <ul style="list-style-type: none"> • Product Attribute • Line Item • Custom <div style="border: 1px solid #f0e68c; padding: 10px; margin-top: 10px;"> <p> • If Context Type is Line Item</p> <ul style="list-style-type: none"> • Field (Mandatory) • Cumulative Dimension - dropdown with the list of existing dimensions • Relation Type : Select a relation type between the context type and the line item field. <p>• If Context Type is Attribute</p> <ul style="list-style-type: none"> • Attribute Group (Mandatory) : Search and select an attribute group • Attribute (Mandatory) : Select an attribute in the attribute group selected above. <p>• If Context Type is Custom</p> <ul style="list-style-type: none"> • Field (Mandatory) </div>
Price Dimension Name (Mandatory)	Give the name to your cloned dimension. The default name will be <i>CLONE - Name</i> .
Description	Enter a description for the dimension.
Field	Select the field for the cloned dimension.
Cumulative Dimension	List of existing dimensions.




Field Name	Description
Type	Select the type of the dimension from the following: <ul style="list-style-type: none"> • Amount • Quantity • Standard (Default selected) • Term • Equipment

5. Click **Save**.

Deleting a Price Dimension

You can delete price dimension that are no longer required for your business requirements.

To delete a price dimension

1. Go to **ADMIN SETUP > Pricing Administration > Price Dimension**. The Price Dimension page is displayed.
2. Search for the price dimension, and do one of the following:
 - To delete a single price dimension, click the ellipsis icon () next to the price dimension name, and click **Delete**.
 - To delete multiple price dimensions, click the checkboxes next to the name column, and click the () icon.
 - To delete all the price dimensions, click the checkbox in the header row next to the name column, and click the () icon.
3. Click **Confirm**.

[Creating a Price Dimension](#)

[Managing Price Dimensions](#)

Managing Price Rulesets

Price Rulesets allow you to apply either line item pricing adjustments or summary pricing adjustments to particular families, categories, or groupings of products. This section provides information on managing price rulesets.


Navigating the Price Rulesets Page

When you launch the Price Rulesets page on the UI, all the existing price rulesets are listed on this page along with their details. There are various functionalities available for you to manage the price rulesets.

Managing Views

You can manage column width, control which columns are displayed in the grid, freeze/pin a column range, or rearrange the column order. You can also filter the view of records in the grid by performing a keyword search, filtering the list by column value, or applying one or more advanced filters and filter logic. For more information, see [Managing the View Settings](#) and [Filtering the Records](#).

Actions available on this page

- Click **Create New** to create a new price rulesets.
- Click the ellipsis icon  next to a price ruleset name to delete an existing price ruleset.
- Click the price ruleset name link to open the Price Rulesets details page.
- Use the **Active** switch to activate or deactivate a price ruleset.
- Export the selected deal guidance. For more information, see [Exporting Records](#).

Refer to the following topics for more information.

- [Creating a Price Ruleset](#)
- [Creating a Price Rule](#)
- [Creating Price Rule Entries](#)
- [Deleting a Price Ruleset](#)
- [Deleting Price Rules](#)
- [Deleting a Price Rule Entry](#)

Creating a Price Ruleset

Price Ruleset enables you to adjust prices for various products through rules, manage special offers, promotions, and discounts based on specific attributes. It can contain multiple rule entries and be dimensional like Price Matrices. You can apply line item and summary pricing adjustments, supporting strategies like discounting rules, promotional pricing, and aggregate adjustments based on Product Family.


For example, if you want to apply a 20% promotional discount on all products within a specific category during a holiday sale, you can achieve this using a Price Ruleset.


To create a price ruleset

1. Go to ADMIN SETUP > Pricing Administration > Price Rulesets to create a price ruleset.
2. Click **Create New** to view New Price Ruleset pop-up window.
3. Enter the following details:


Field	Description
Ruleset Name	Enter a mandatory name for the ruleset.
Sequence	Enter a mandatory Sequence in which the system will evaluate multiple rulesets. Typically, you will perform line item adjustments first and then any summary adjustments.
Description	Enter a description for the ruleset.
Effective Date	This field is visible only if you turn the Enable Date Range setting on. Select an effective date for the rule. It is a mandatory field.
Expiration Date	This field is visible only if you turn the Enable Date Range setting on. Select an expiration date for the rule. It is a mandatory field.
Active	Turn this setting on to set the ruleset as active.
Stop Processing More Rules	Turn this setting on to indicate that if the ruleset is satisfied, CPQ does not process any more rules.

4. Click **Save** to save the new price rule. A price rule is created and you are redirected to the price ruleset details page.
5. On the Details tab, you can update the details if required.
6. Click the Condition & Charge Type Criteria tab and enter the following details:
7. Under the Conditions section:
 - a. In the **Price List** field, search and select a price list.

- b. Click the **Product Family** drop-down to select a product family.
 - c. On the **Product Category** field, search and select a product category.
 - d. On the **Product Group** field, search and select a product group.
 - e. Click the **Category** drop-down to select a category.
 - f. Click the **Charge Type** drop-down to select a charge type.
8. Under the Application section:
- a. Application Level: Select a level to which this ruleset will be applied. The supported values are:
 - Line Item: Selecting this will apply the line item adjustment within the line item net price in the shopping cart.
 - Bundle: Selecting this will apply the adjustment to a bundle and its options and the adjustment is displayed in the Totals tab in the shopping cart.
 - Aggregate: Selecting this enables the **Application Method** field.
 - b. Application Method: This field is enabled if you selected Aggregate from the **Application Level** drop-down list. This indicates that you want the adjustment to select products in aggregate but apply an adjustment as a summary line in the Totals tab or spread the adjustment over numerous products. The supported values are:
 - Apply to Line Items: Applies the adjustment to line items on the cart.
 - Create Summary Lines: Applies the adjustment as a summary line in the Totals tab on the cart.
9. Under Charge Type Criteria, add a criteria. This allows you to set criteria for a line item rule or a bundle, depending on the **Application Level** you have selected, such that the ruleset only applies when it satisfies a line level field value or a product attribute value.
- a. Click **Rule Set Criteria**. The Charge Type Criteria pop-up is displayed.
 - b. On the Line Items tab, enter the following details:
 - i. **Field**: Search and select a field on the product. You can select custom fields also.
 - ii. **Operator**: Click and select an operator from the dropdown list.
 - iii. **Value**: Enter a value.
 - iv. Click **Add Criteria** to add one more criteria.
 - v. Click the remove icon  to remove a criteria.
 - vi. Click **Remove All** to remove all criteria
 - vii. Turn the **Logic** button on and enter a value in the **Logic** field when you add multiple criteria.
 - viii. Click **Save**.
 - c. On the Product Attributes tab, enter the following details:

- i. **Field:** Search and select a field on the product. You can select custom fields also.
 - ii. **Operator:** Click and select an operator from the dropdown list.
 - iii. **Value:** Enter a value.
 - iv. Click **Add Criteria** to add one more criteria.
 - v. Click the remove icon  to remove a criteria.
 - vi. Click **Remove All** to remove all criteria
 - vii. Turn the **Logic** button on and enter a value in the **Logic** field when you add multiple criteria.
 - viii. Click **Save**.
- d. Click **Save** on the price ruleset details page.

To delete a price ruleset

1. Go to ADMIN SETUP > Pricing Administration > Price Rulesets. The Price Rulesets page is displayed.
2. Search for the price ruleset you want to delete.
3. Click the ellipsis icon  next to the price ruleset name and click **Delete**. The Delete Price Ruleset pop-up is displayed.
4. Click **Confirm**.

Creating a Price Rule

You can associate multiple rules to a rule set or through to a product. Price matrices can be defined in price rules as well as conditional price rules (rules that use boolean logic such as AND/OR). Price rules can be dimensional, which use a similar concept as Price Matrices or Conditional, that relate to fields for pricing adjustments.


One ruleset can have multiple rules and are evaluated in order of the rule sequence. A rule can be dimensional or conditional. A price rule determines the actual price adjustment made

Price Rule Search

You can narrow down the price rules using the search feature. You can either define search criteria to search for a range of price rules or use the price rule search option.

Basic Search


In basic search, you can search for a price rule using keywords. For example, you can search using the name of the price rule.

1. In the **Search this list** field, enter a keyword related to your price rule name.
2. Click the search icon  or press Enter. CPQ returns all price dimensions that contain that keyword in the price dimension names.

Sorting Price Rule

You can sort the price rules by clicking the column names. The price rules are sorted alphabetically. Every time you click the column name, the sorting switches between ascending and descending order. You can adjust the column width by dragging the columns. Hover near the column boundaries till two-way arrow appears. Click when the arrow appears and drag left or right to adjust the column width.

To create a price rule

1. Go to ADMIN SETUP > Pricing Administration > Price Rulesets. The Price Rulesets page is displayed.
2. Click the required price ruleset name link to open the Price Rulesets details page.
3. Click the Price Rules tab.
 - If there are existing price rules, you can perform the following actions on the list of rules:
 - i. Click **Create New** to create new price rule. Go to step 4.
 - ii. Click the required price rule name link to open the price rule details page.
 - iii. Rearrange the sequence of rules using the  icon.
 - iv. Turn the **Is Active?** setting on to make the rule active.
 - v. Click the ellipsis icon for the rule and click **Delete**.
 - If there are no unsaved changes, the Delete Price Rule pop-up is displayed. Click **Confirm**.
 - If there are unsaved changes, the a pop-up is displayed prompting your confirmation. Click Discard Changes. The Delete Price Rule pop-up is displayed. Click **Confirm**.
 - If there are no rules created, click **Create New** on the required rule type.
 - i. Dimension
 - ii. Condition
4. Enter the following details:

Field	Setting
Rule Name	Enter a mandatory rule name.
Sequence	Enter a mandatory sequence for the rule.

Field	Setting
Description	Enter a description for the rule.
Active	Turn this setting on to make the rule active.
Stop Processing More Rules	Turn this setting to indicate that if the ruleset is satisfied, CPQ does not process any more rules.
Adjustment Applies To	Select an option to which the adjustment is applied. This is for line item adjustments only. Supported values are: <ul style="list-style-type: none"> • Base Extended Price • Base Price (this is the default value) • Extended Price • List Price
Adjustment Charge Type	Select an option to set summary level adjustments as a charge type. Supported value is Adjustment (this is the default value also).
Allow Renewal of Adjustment	Turn this setting on to allow complete removal of a price adjustment.
Rule Type	Select a rule type. Supported values are: <ul style="list-style-type: none"> • Dimension • Condition

5. Under Dimensions:

 The Dimensions section is applicable for Dimension rule type.

- a. Click **Add Dimensions**.
- b. In the **Dimension** field, search and select a dimension.
- c. In the **Dimension Value** field, select an option. Supported values are:
 - Discrete
 - Range
 - Weighted Range
 - Cumulative Range - Line Item
 - Cumulative Range

6. Click **Save**.


Creating Price Rule Entries


You can create Dimension or Condition type price rule entries as per the requirement.

Dimension


1. Go to ADMIN SETUP > Pricing Administration > Price Rulesets. The Price Rulesets page is displayed.
2. Click the required price ruleset name link to open the Price Rulesets details page.
3. Click the Price Rules tab.
 - If there are existing metrics, click the required price rule name link to open the price rule details page.
 - If there are no metrics created, create a price rule. For more information, see [Creating a Price Rule](#).
4. On the Entries tab, click **Add**. A price rule entry is added.
5. Enter the following details:

Field	Description
<dimension>	Enter a value for the dimension. The number of dimensions depends on how many dimensions you have configured for the price rule.
Adjustment Amount	Enter a percentage or a number to adjust the price.
Adjustment Type	Select the kind of adjustment required if the criteria is met. For example, an override to a list price, markup, or discount.
Adjustment Amount Source	Search and select a field from where the adjustment must be sourced.

6. Click Formula Builder icon  to define the adjustment amount on price rule entry as an expression to have a dynamic adjustment value.
 - a. Go to the Field tab and search for your desired field from the list. Click the arrow next to the field name to view and select its related child fields. The formula expression, determined by the selected object-field and/or subfield, appears on the right panel of the formula builder.
 - b. Click Insert to add it to the expression.
 - c. Go to the Functions tab, select a function from the list, and click **Insert** to add it to the expression.

- d. Click any operator available below the expression window to add it to the expression.
 - e. Continue building your expression.
 - f. Click **Clear** to remove the entire expression, or manually remove it by pressing the Backspace key.
 - g. Click **Validate** to check your formula. The application verifies the formula and displays a confirmation message if it is valid. If the formula is invalid, an error message is displayed.
 - h. Click **Save**.
7. Turn the setting **Copy the current data in new row** on to copy the details of a price rule entry to the next entry.
 8. In the **Number of rows** field, enter a value of how many rows you want to add.
 9. Click the ellipsis icon () for the entry and click **Delete**.
 - a. If there are no unsaved changes, the Delete Price Rule Entry pop-up is displayed. Click **Confirm**.
 - b. If there are unsaved changes, the a pop-up is displayed prompting your confirmation. Click Discard Changes. The Delete Price Rule Entry pop-up is displayed. Click **Confirm**.
 10. Click **Save**.

Condition


1. Go to ADMIN SETUP > Pricing Administration > Price Rulesets. The Price Rulesets page is displayed.
2. Click the required price ruleset name link to open the Price Rulesets details page.
3. Click the Price Rules tab.
 - If there are existing metrices, click the required price rule name link to open the price rule details page.
 - If there are no metrices created, create a price rule. For more information, see [Creating a Price Rule](#).
4. On the Entries tab, click **Add**. A price rule entry is added.
5. Click **Add Condition**. The Charge Type Criteria pop-up is displayed.
 - a. On the Line Items tab, enter the following details:
 - i. **Field**: Select a field on the product. You can select custom fields also.
 - ii. **Operator**: Select an operator.
 - iii. **Value**: Enter a value.
 - iv. Click **Add Criteria** to add one more criteria.
 - v. Click the remove icon () to remove a criteria.
 - vi. Click **Remove All** to remove all criteria.


- vii. Turn the **Logic** button on and enter a value in the **Logic** field when you add multiple criteria.
- viii. Click **Save**. A criteria is added under the Condition column.
- b. On the Product Attributes tab, enter the following details:
 - i. **Field**: Select a field on the product. You can select custom fields also.
 - ii. **Operator**: Select an operator.
 - iii. **Value**: Enter a value.
 - iv. Click **Add Criteria** to add one more criteria.
 - v. Click the remove icon (🗑️) to remove a criteria.
 - vi. Click **Remove All** to remove all criteria.
 - vii. Turn the **Logic** button on and enter a value in the **Logic** field when you add multiple criteria.
 - viii. Click **Save**. A criteria is added under the Condition column.

6. Enter the following details:

Field	Description
Adjustment Amount	Enter a percentage or a number to adjust the price.
Adjustment Type	Select the kind of adjustment required if the criteria is met. For example, an override to a list price, markup, or discount.
Adjustment Amount Source	Search and select a field from where the adjustment must be sourced.

⚠️ You can add dynamic adjustment amounts to price rule entries, using the formula builder to define expressions for both static values and formula fields.




- 7. Click Formula Builder icon  to define the adjustment amount on price rule entry as an expression to have a dynamic adjustment value.
 - a. Go to the Field tab and search for your desired field from the list. Click the arrow next to the field name to view and select its related child fields. The formula expression, determined by the selected object-field and/or subfield, appears on the right panel of the formula builder.
 - b. Click Insert to add it to the expression.
 - c. Go to the Functions tab, select a function from the list, and click **Insert** to add it to the expression.
 - d. Click any operator available below the expression window to add it to the expression.
 - e. Continue building your expression.

- f. Click **Clear** to remove the entire expression, or manually remove it by pressing the Backspace key.
 - g. Click **Validate** to check your formula. The application verifies the formula and displays a confirmation message if it is valid. If the formula is invalid, an error message is displayed.
 - h. Click **Save**.
8. Turn the setting **Copy the current data in new row** on to copy the details of a price rule entry to the next entry.
 9. In the **Number of rows** field, enter a value of how many rows you want to add.
 10. Click the ellipsis icon () for the entry and click **Delete**.
 11. Click **Save**.

Deleting a Price Ruleset

You can delete price ruleset that are no longer required for your business requirements.

To delete a price ruleset




1. Go to **ADMIN UP > Pricing Administration > Price Ruleset**. The price rulesets page is displayed.
2. Search for the price ruleset and do one of the following:
 - To delete a single price ruleset, click the ellipsis icon () next to the rollup name, and click **Delete**.
 - To delete multiple price rulesets, click the checkboxes next to the name column, and click the () icon.
 - To delete all the price rulesets, click the checkbox in the header row next to the name column, and click the () icon.
3. Click **Confirm**.

Deleting Price Rules

You can delete price rule that are no longer required for your business requirements.

To delete a price rule




1. Go to **ADMIN UP > Pricing Administration > Price Ruleset**. The price ruleset page is displayed. Search for the ruleset you want to edit.
2. Click the Ruleset. The Price Ruleset detail page is displayed. Click the **Price Rules** tab.

3. Search for the price rule and do one of the following:
 - To delete a single price rule, click the ellipsis icon () next to the rollup name, and click **Delete**.
 - To delete multiple price rules, click the checkboxes next to the name column, and click the () icon.
 - To delete all the price rules, click the checkbox in the header row next to the name column, and click the () icon.
4. Click **Confirm**.

Deleting a Price Rule Entry

You can delete price rule entry that are no longer required for your business requirements.

To delete a price rule entry

1. Go to **ADMIN UP > Pricing Administration > Price Ruleset**. The price ruleset page is displayed. Search for the ruleset you want to edit.
2. Click the Ruleset. The Price Ruleset detail page is displayed. Click the **Price Rules** tab.
3. The Price Rule detail page is displayed. Click the **Price Rule Entry** tab.
4. Search for the price rule entry and do one of the following:
 - To delete a single price rule entry, click the ellipsis icon () next to the rollup name, and click **Delete**.
 - To delete multiple price rule entries, click the checkboxes next to the name column, and click the () icon.
 - To delete all the price rule entries, click the checkbox in the header row next to the name column, and click the () icon.
5. Click **Confirm**.

Managing Deal Guidance

Deal Guidance provides you means to determine if a deal is appropriate based on a set of predefined rules. These rules drive the color bands and shapes that are displayed on the cart to help you determine if a deal is good or not. The feature guides you to present a deal that aligns with your organization's objectives which in turn helps to fast-track the deals.

There are three types of deal guidance:

- Color Bands
- Dimension & Sets

- [Guidance Rules](#)


Navigating the Deal Guidance Page

When you launch the deal guidance page on the UI, all the existing deal guidance are listed on this page along with their details. There are various functionalities available for you to manage the deal guidance.

Managing Views

You can manage column width, control which columns are displayed in the grid, freeze/pin a column range, or rearrange the column order. You can also filter the view of records in the grid by performing a keyword search, filtering the list by column value, or applying one or more advanced filters and filter logic. For more information, see [Managing the View Settings](#) and [Filtering the Records](#).

Actions available on this tab

- Click **New Dimension Set** to create a new dimension.
- Click the ellipsis icon  next to the dimension set name to edit or delete an existing dimension set.
- Click the dimension set name link to open the dimension set details page.
- Export the selected deal guidance. For more information, see [Exporting Records](#).


Refer to the following topics for more information.


- [Associating Dimension to the Dimension Set](#)
- [Creating a Color Band](#)
- [Creating a Dimension Set](#)
- [Creating Guidance Rules](#)
- [Creating a Dimension](#)
- [Deleting Color Bands](#)
- [Deleting a Dimension](#)
- [Deleting Dimensions Sets](#)
- [Deleting Guidance Rule](#)

Associating Dimension to the Dimension Set

You can associate more than one dimension set with a dimension.

To associate a dimension with a dimension set

1. Go to **ADMIN SETUP > Pricing Administration > Deal Guidance > Dimension & Sets**.
The Dimension page is displayed.
2. Click the **Dimension Sets** tab.
3. Search for the dimension set to update.
4. Click the dimension set name link to open the Dimension Set details page.
5. Click the **Associated Dimensions** tab.
6. Under Available Dimensions, you can see all dimensions available in the org.
7. In the **Search Dimension** field, enter keywords to search the dimension you want to associate with the dimension set and click the search icon  or press Enter.
8. Hover the mouse on the required dimension and click + next to the dimension name.
The dimension is associated with the dimension set and is displayed in the Associated Dimensions section (right-hand side).
9. Create a Dimension:
 - If the desired dimension does not exist, click **Create New Dimension** under the Available Dimension page.
 - The New Dimension page will be displayed.
 - Follow the steps in [Creating a Dimension](#) to configure the new dimension.
 - After configuring and saving the new dimension, return to the Associated Dimensions page.
 - Search for the newly created dimension as described in step 7 and associate it with the dimension set.
10. Click **Save**.


 The **Save** button is enabled only when you make any changes to the associated dimensions.
11. To discard changes:
 - a. Click **Discard Changes**. The Alert pop-up is displayed.
 - b. Click **Don't Save**.

Creating a Color Band


To create a Color Band

1. Go to ADMIN SETUP> Pricing Administration > Deal Guidance > Color Bands. The Color Bands page is displayed.
2. Click the **Add Color Band** button. The Color Bands list page is displayed.
3. Enter the following details:


Field	Description
Band Name	Enter a name for the Band name. This is a mandatory field.
Color Code	Give a color code to the new Band Name. This is a mandatory field.
Deal Shape	Choose a Deal Shape from the given picklist. This is a mandatory field.
Description	Enter a description for the Band Color.

4. Click **+**. A new Band Color will be created.
 - i. Enter the details that is required.
 - ii. Click the delete icon {  } to remove the color band.
 - iii. Click **Save**.

To delete a Color Band

1. Go to ADMIN SETUP > Pricing Administration > Deal Guidance > Color Bands. The Color Bands page is displayed.
2. Search for the color band that you want to delete.
3. Click the delete icon {  } to remove the color band.
4. Click **Confirm**

To update a Color Band

1. Go to ADMIN SETUP > Pricing Administration > Deal Guidance > Color Bands. The Color Bands page is displayed.
2. Search for the color band that you want to update.
3. Select the field that you want to update and click {  } icon.
4. Enter the desired changes and click **Save**.

Creating a Dimension Set

To create a dimension set


1. Go to ADMIN SETUP> Pricing Administration > Deal Guidance. The Dimension and Sets page is displayed.

2. On the Dimension Sets tab, click **New Dimension Set**.
3. Enter the following details:

Field	Description
Set Name	Enter a name for the dimension set
Guidance Type	Select a type of guidance that controls which values are available on the Business Object drop-down. Supported value is Line Level, which means the guidance is based on a field at the line-item level.
Business Object	Select a business object for the dimension set. The options on the Business Object drop-down depend on the Guidance Type selection. This must match the object you plan to use the deal guidance for. Supported value is Lineltem.
Description	Enter a brief description of the dimension set.

4. Click **Save**.

To delete a dimension set

1. Go to ADMIN SETUP> Pricing Administration > Deal Guidance. The Dimension and Sets page is displayed.
2. Click the Dimension Sets tab.
3. Click the ellipsis icon  next to the dimension set name and click **Delete**. The Delete Dimension Set pop-up is displayed.
4. Click **Confirm**.

Creating Guidance Rules

To create a guidance rule


1. Go to ADMIN SETUP> Pricing Administration > Deal Guidance > Guidance Rules. The Guidance Rules page is displayed.
2. Click **Create New**.
3. Enter the following details:

Rule Name	Enter a name for the guidance rule.
-----------	-------------------------------------

Sequence	Enter the sequence for the rule.
Guidance Type	Select a type of guidance that controls which values are available on the Business Object drop-down. Supported value is Line Level, which means the guidance is based on a field at the line-item level.
Is Active	Toggle-on to make the rule active.
Business Object	Select a business object for the guidance rule. The options on the Business Object drop-down depend on the Guidance Type selection. This must match the object you plan to use the deal guidance for. Supported value is LineItem.
Dimension Set	Select the Dimension set.
Measure	Select the measure.
Currency Scope	Select the currency for the rule.
Description	Enter a brief description of the guidance rule.

4. Click **Save**.

To delete a guidance rule

1. Go to ADMIN SETUP> Pricing Administration > Deal Guidance> Guidance Rules. The Guidance Rules page is displayed.
2. Click the ellipsis icon  next to the guidance rule name and click **Delete**. The Delete Deal Guidance Rule pop-up is displayed.
3. Click **Confirm**.

Creating a Dimension

To create a dimension


1. Go to ADMIN SETUP> Pricing Administration > Deal Guidance > Dimension and Sets. The Dimension and Sets page is displayed.

2. Click the Dimension tab.
3. On the Dimension tab, click **Create New**.
4. Enter the following details:

Field	Description
Dimension Name	Enter a name for the dimension.
Field	Select the field.
Business Object	Select a business object for the dimension set. The options on the Business Object drop-down depend on the Guidance Type selection. This must match the object you plan to use the deal guidance for. Supported value is Lineltem.
Description	Enter a brief description of the dimension.

5. Click **Save**.


To delete a dimension



1. Go to ADMIN SETUP > Pricing Administration > Deal Guidance. The Dimension and Sets page is displayed.
2. Click the Dimension tab.
3. Click the ellipsis icon  next to the dimension name and click **Delete**. The Delete Dimension pop-up is displayed.
4. Click **Confirm**.

Deleting Color Bands

You can delete color bands that are no longer required for your business requirements.

To delete a color band




1. Go to **ADMIN SETUP > Pricing Administration > Color Band**. The Color Bands page is displayed.
2. Search for the color band and do one of the following:
 - To delete a single color band, click the ellipsis icon () next to the rollup name, and click **Delete**.

- To delete multiple color band, click the checkboxes next to the name column, and click the () icon.
 - To delete all the color band, click the checkbox in the header row next to the name column, and click the () icon.
3. Click **Confirm**.

Deleting a Dimension

You can delete dimension that are no longer required for your business requirements.



To delete a Dimension


1. Go to **ADMIN UP > Pricing Administration > Dimension** . Click the Dimension tab. The dimensions page is displayed.
2. Search for the dimension and do one of the following:
 - To delete a single dimension, click the ellipsis icon () next to the rollup name, and click **Delete**.
 - To delete multiple dimensions, click the checkboxes next to the name column, and click the () icon.
 - To delete all the dimensions, click the checkbox in the header row next to the name column, and click the () icon.
3. Click **Confirm**.

Deleting Dimensions Sets

You can delete dimension sets that are no longer required for your business requirements.

To delete a Dimension Set




1. Go to **ADMIN SETUP > Pricing Administration > Dimension Set**. Click the Dimension Set tab. The dimension sets page is displayed.
2. Search for the dimension set and do one of the following:
 - To delete a single dimension set, click the ellipsis icon () next to the rollup name, and click **Delete**.
 - To delete multiple dimension set, click the checkboxes next to the name column, and click the () icon.

- To delete all the dimension set, click the checkbox in the header row next to the name column, and click the () icon.
3. Click **Confirm**.

Deleting Guidance Rule

You can delete guidance rules that are no longer required for your business requirements.

To delete a guidance rule

1. Go to **ADMIN SETUP > Pricing Administration > Deal Guidance > Guidance Rule**. The guidance rules page is displayed.
2. Search for the guidance rule and do one of the following:
 - To delete a single guidance rule, click the ellipsis icon () next to the rollup name, and click **Delete**.
 - To delete multiple guidance rules, click the checkboxes next to the name column, and click the () icon.
 - To delete all the guidance rules, click the checkbox in the header row next to the name column, and click the () icon.
3. Click **Confirm**.

Managing Promotions


Navigating the Promotions Page

When you launch the promotions page on the UI, all the existing promotions are listed on this page along with their details. There are various functionalities available for you to manage the promotions.

Managing Views

You can manage column width, control which columns are displayed in the grid, freeze/pin a column range, or rearrange the column order. You can also filter the view of records in the grid by performing a keyword search, filtering the list by column value, or applying one or more advanced filters and filter logic. For more information, see [Managing the View Settings](#) and [Filtering the Records](#).

Actions available on this page

- Click **Create New** to create a new promotion.
- Click the ellipsis icon  next to the promotion name to delete an existing promotion.
- Click the promotion name link to open the promotion Details page.
- Export the selected promotions. For more information, see [Exporting Records](#).

This section provides information on managing promotions.

- [About Promotions](#)
- [Viewing Promotions](#)
- [Creating a Promotion](#)
- [Editing a Promotion](#)
- [Deleting Promotion](#)
- [Exporting Promotions](#)

About Promotions

Promotions add value to a product through discount pricing and add reward for purchase. Promotions provide value for money for your customers and contribute to better sales for your organization. With the Conga Promotions package, you can incentivize the sales of products in your inventory.

A promotion is a marketing technique that you apply to reduce the list price of a product or a service. A promotion consists of all non-tech activities that marketers use to try to increase sales over a specific period of time. You can create such promotions and restrict their scope, limit, and benefits so that your sales representatives can apply promotions to specific products, for specific customers, and for a limited period.

The following types of promotions are available.

Pro moti on Typ e	Description	Example
Buy X Get X	When the customer purchases a product, you offer some benefit on the same product.	As a marketing manager of a mobile phone company, you need to promote a new smart phone. You create a promotion where you offer your customers 20% discount on the price of the phone that they buy.

Promotion Type	Description	Example
Buy X Get Y	When the customer purchases a product, you offer some benefit on a different product.	As a marketing manager of an e-commerce company, you need to increase the sales of a refrigerator. You create a promotion where you offer your customers a free voltage stabilizer when they buy the refrigerator.
For every X Get X	When the customer purchases a certain quantity of a product, you offer some benefit on the same product.	As a marketing manager of a telecommunications company, you need to retain existing enterprise customers. You create a promotion where you offer your customers 10% discount on the price of each subscription for every 10 subscriptions that they buy.
For every X Get Y	When the customer purchases a certain quantity of a product, you offer some benefit on a different product.	As a marketing manager of a software company, you need to provide competitive pricing to a software as a service product during heavy competition. You create a promotion where you offer your customers free training for every 10 licenses that they buy.

Creating a Promotion

Viewing Promotions


The Promotion section is primarily designed for use by the Sales and Marketing department admin. The Promotions page provides a comprehensive listing of existing promotions and lets you filter, sort, and delete a promotion as required. You can also create new promotions from this page.

Promotions Search

You can narrow down the promotions list using the search feature. You can either define a search criteria to search for a range of promotions or use the promotion search option.


Basic Search

In basic search, you can search for a promotion using keywords. For example, you can search using the name of the promotion.

1. In the **Search this list** field, enter a keyword related to your promotion details such as promotion name.
2. Click the search icon  or press Enter. CPQ returns all promotions that contain that keyword in the promotion names.

Advanced Search


In advanced search, you can search for a promotion using a search query. The search query uses options provided in Field, Operator, and Value and displays a search result that matches the criteria.

1. Click the Advanced Search icon . The Advanced Search pop-up is displayed.
2. Click **Add Criteria**.
3. Enter the following details:
 - a. **Field:** All promotion field options are available in the drop-down list such as Promotion Code, Promotion Name, Type, Effective Date, Expiration Date, Last Modified Date, and Auto Apply?
 - b. **Operator:** Operators that are available for selection helps create the filter expression. Operators are displayed based on the field types.
 - c. **Value:** Enter a value.
4. Click **Add Criteria** if you want add more criteria in the advanced search.
5. Review the filter expression.
6. Click **Apply** to enable the search filter. CPQ returns all promotions that match the criteria.

Sorting promotions

You can sort the promotions list by clicking the column names. The promotions are sorted alphabetically in ascending order using the promotion name. Every time you click the column name, the sorting switches between ascending and descending order. You can adjust the column width by dragging the columns. Hover near the column boundaries till two-way arrow appears. Click when the arrow appears and drag left or right to adjust the column width.

Actions available on this page

- Click **Create New** to create a new promotion.
- Click the promotion name to view or edit the details of the promotion.
- Click the ellipsis icon  next to the promotion code to delete an existing promotion.

Items per page

At the bottom of the page, you can see the total count of promotions available. You can control the number of promotions to be displayed on each page. You can select the number of promotions from a predefined list. You cannot configure this list. By default, you see 20 records on each page.

By default, you can sort 10, 20, 30, 50, and 100 promotions per page using the **Rows per page** drop-down. This feature works in association with the search and filter functions to display search records per page. You can use the < and > buttons to move to the next or the previous pages. You can also jump to a certain page using the page search component.

Promotion Summary

- Click on a promotion name from the list of promotions to view details for all sections that is Information, Scope, Criteria, Benefits, Limits and Coupons.
- All the sections have 'Expand' and 'Collapse' effects to view the details. The data is displayed in read-only mode.
- You can edit a section of the promotion from the Summary page. For example, open a promotion and expand **Benefits**. Click **Edit** to modify the benefits that are applied to the selected promotion.

Creating a Promotion

Every promotion you create has the following aspects that you must define:

- [Information](#)
- [Scope](#)
- [Criteria](#)
- Benefits
- Limits
- Coupons

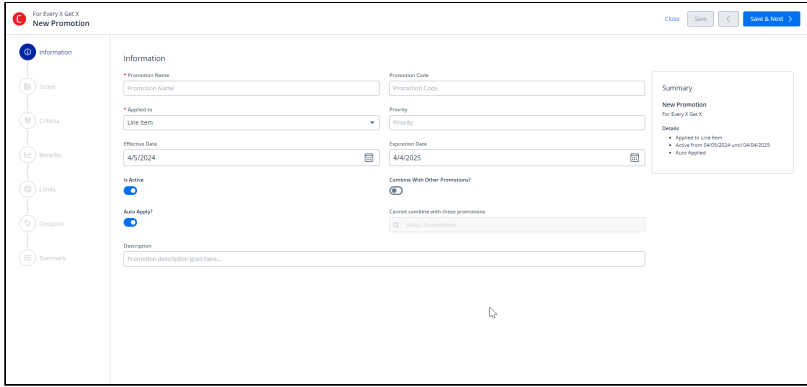
Each aspect of a promotion is dependent on certain objects and fields that you must configure or define before you can create your first promotion.

Defining Information of a Promotion

To create a promotion

1. Go to ADMIN SETUP> Pricing Administration > Promotions. A list of promotions is displayed.
2. Click **Create New**.

3. Select a promotion type.
 - i. Buy X Get X
 - ii. Buy X Get Y
 - iii. For Every X Get X
 - iv. For Every X Get Y
4. Click **Continue**. The Information page is displayed.



5. Enter the following details:

Field	Description
Promotion Name	Enter a name for the promotion. This name is displayed along with the promotion information. For example, whenever you look-up the promotion information that is applicable to a specific product, the promotion name that you provided here is displayed.
Promotion Code	Enter the code that is used for applying promotion. This code is captured on the order or proposal line items when the promotion is applied to the line item. Marketing teams can use this code for marketing campaigns. When a promotion is not auto-applied, that is when the Auto Apply? is deactivated or off, you can use the promotion code to avail a promotional offer.
Applied To	<p>You can apply promotions on line item and on order levels. Select from the following options:</p> <ol style="list-style-type: none"> a. Line Item: To apply a promotion on line item level. This line item is the primary object to which your promotion is applied. b. Summary Group: To apply promotion on the order level. <p>If you select 'Buy X Get X' promotion, only then can you choose between Line Item and Summary Group. For all other types of promotions, Line Item is the default selection.</p>

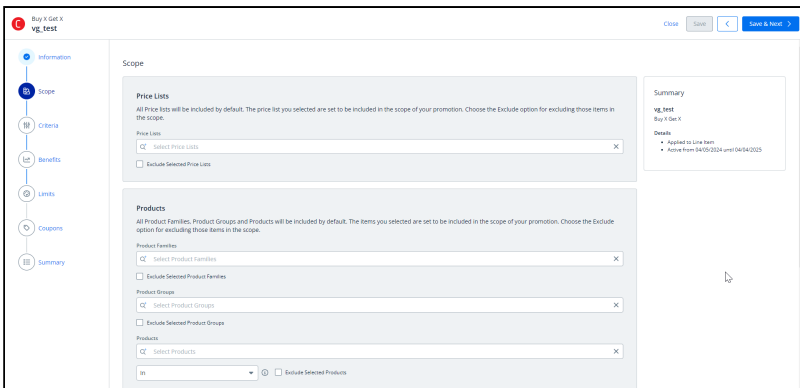
Field	Description
Priority	Enter a number for the priority.
Effective Date	Date from which the promotion is applicable. Cannot be blank. By default, it is set to current date (date when you create the promotion record) +1.
Expiration Date	Date on which the promotion expires. Cannot be blank. Should be greater than the effective or the start date. By default, it is set to 1 year from the effective date.
Is Active	Can be set to <i>On</i> or <i>Off</i> . Set it to <i>On</i> when you want a promotion to be applied and should be active for the criteria which you specify. Active flag on the promotions is set using a workflow linked to approvals similar to what you would do for any other custom object approval. For example, you can write a workflow rule to set the active status to true once the promotion is Approved (if approval is set up). Approvals set up would be similar to custom object approvals for any object.
Auto Apply?	Can be set to <i>On</i> or <i>Off</i> . Set it to <i>On</i> when you want a promotion to be automatically applied when a promotion criterion is met. Set it to <i>Off</i> when you want to manually enter an Incentive Code to apply a promotion. If you want to create coupons along with the promotion, then set Auto Apply? to <i>Off</i> .
Combine with Other Promotion?	Enables you to combine the new promotion with an existing promotion.
Cannot combine with these promotions	<p>Enabled only if Combine With Other Promotions? is set to On.</p> <p>You can select a list of promotions which should not be combined with the new promotion.</p> <p>This is a generic grouping of the promotions for analyzing and tracking the promotions. You can select one or more promotion groups. The list of Promotion Groups needs to be defined separately in the Incentive Group object and should be active. Marketing managers can create reports and track the groups that are more successful than others and drive the business strategy accordingly.</p>
Description	Enter a description for the promotion.

- Review the summary box which displays the details of the promotion which you have created.
- Click **Save** to save the changes or click **Save & Next** to move to the next tab.

After you have described the promotion, you must now define the scope of this new promotion.

Defining Scope of a Promotion

You must define the scope of a promotion to determine the types of accounts, the regions, and the products that this promotion will be available to.



To define the scope of your new promotion

- Define values for the fields described in the following table.

Note

The default value for each field is **All**. If you do not select a value, CPQ evaluates all items for each field and that can impact the performance. By default, the fields you define are set to be included in the scope of your promotion. Select the **Exclude** radio button for any parameter if you want to exclude that specific object from the scope of your promotion.

Field	Description
Price List	Select the price list that you want to use for your promotion.

Field	Description
Product Family	<p>Select the Product Family that you want to apply the promotion to.</p> <ul style="list-style-type: none">• Exclude: The promotion will not be applied to the product families specified.

Field	Description
<p>Product</p>	<p>Select the specific products that you want to apply the promotion to. You can search a product by its name or code.</p> <p>If you selected Promotion Type as <i>Buy X Get X</i> on the Information page, you will see the following options:</p> <ul style="list-style-type: none"> • IN (Include (OR)): CPQ applies promotion on all products (in scope), which are available in the cart. • ALL (Include (AND)): CPQ applies promotion on all products (in scope) only if the products are added to the cart. • ALL IN BUNDLE (Include Bundle Options (AND)): CPQ applies promotion to a bundle and options only if the bundle is configured with specified options. • Exclude: The promotion will not be applied to the products specified. <p>Functionalities</p> <ul style="list-style-type: none"> • To use Include (OR) scope, update the Product Criteria Oper field as "in". • To use Include (AND) scope, update the Product Criteria Oper field as "all". • To use Include Bundle Option (AND) scope, update the Product Criteria Oper field as "all in bundle". <p>If you selected Promotion Type as <i>Buy X Get Y</i> on the Information page, you will see the following options:</p> <ul style="list-style-type: none"> • IN (Include (OR)): If one of the specified products is included in the cart, CPQ applies the promotion to the benefit product. • ALL (Include (AND)): If all specified products are included in the cart, CPQ applies the promotion to the benefit product. • ALL IN BUNDLE (Include Bundle Options (AND)): If the bundle and all specified option products are included in the cart, CPQ applies the promotion to the benefit product.

Field	Description
	<ul style="list-style-type: none"> • Exclude: CPQ does not apply the promotion to the products specified.
Product Group	<p>Select the Product Group that you want to apply the promotion to.</p> <ul style="list-style-type: none"> • Exclude: The promotion will not be applied to the product groups specified.
Account Type	Select the types of accounts for which you want to make this promotion available.
Accounts	Select the accounts for which you want to make this promotion available.

2. Click **Save** to save the changes or click **Save & Next** to move to the next tab.

After the scope, you must now [define the criteria](#) for this promotion.

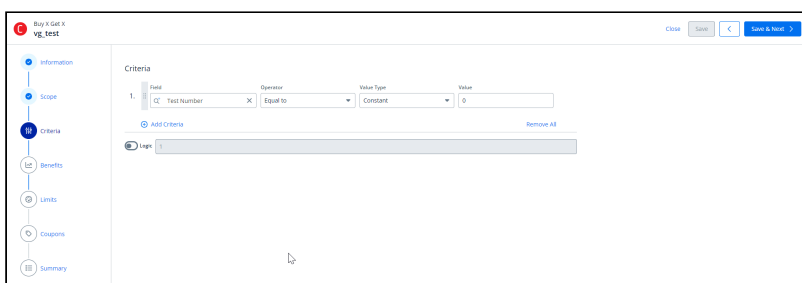
Defining Criteria of a Promotion

You must define the criteria for a promotion before making it available to customers. If a sales representative wants to apply this promotion to a customer's purchase, the criteria you define here will determine if that purchase qualifies for the promotion.

You can define two types of criteria based on:

- The past purchases of customers or rolled-up metrics of past purchases.
- The data from the line item, header, lookup objects, and child objects of the lookup objects for a quote or an order.

You can also define additional filter criteria to determine which products this promotion applies to.



To define the scope of your new promotion

1. Define values for the fields described in the following table.

Field	Description
Field	<p>Select an option from this list of fields to which the promotion must be applied. The fields available depend on what Reference Data Source you selected while defining the information.</p>
Operator	<p>If the field you defined is a picklist or a lookup field, you can select one of the following operators.</p> <ul style="list-style-type: none"> • equal to • not equal to • in • not in <p>For any other field you defined, select one of the following operators.</p> <ul style="list-style-type: none"> • equal to • not equal to • less than • less than or equal to • greater than • greater than or equal to • contains (displayed only if you selected a field of type text or area such as Description)
Value Type	<p>If you select <i>Constant</i> (default), only Value is displayed.</p> <p>If you select <i>Field Value</i>, Field Value is displayed.</p> <p>If the field you selected is a date, you can select from one of the following options:</p> <ul style="list-style-type: none"> • Offset (+) Days • Offset (-) Days • Offset (+) Months • Offset (-) Months

Field	Description
Value	<p>This field is visible only if you select <i>Constant</i> from the Value Type drop-down.</p> <p>Enter a simple constant value or select single or multiple values using the search widget depending on the field type and operator you defined for the primary data source.</p> <p>If you select <i>Product</i> from the Field drop-down, you can search for a product by its name or code in the Value field. The search results display the product name and code wherever applicable. If a product has a code defined, the search result displays the name and code; otherwise, the search result displays only the name.</p>
Field Value	<p>This field is visible only if you select <i>Field Value</i> from the Value Type drop-down.</p> <p>Select one from the list of fields from the child filter object.</p>

- To add a new row click the **Add Criteria** button.
- By default all the criteria will be in the **AND** condition. If you want to modify the logic then toggle on for the logic and enter the condition manually. For example, If the user wants the 'Criteria Expression' to be generated automatically as per the created rows with AND operation, you can keep the 'Logic' as Turned Off. By doing this, all the criteria will have by default AND operators in between and the string will be generated as 1 AND 2 AND 3 automatically. Whereas, if the user wants to create the expression string manually, then the 'Logic' should be turned on and you can create expressions manually such as 1 AND (2 OR 3), (1 OR 2) AND 3 etc.
- Click **Save** to save the changes or click **Save & Next** to move to the next tab.

After the scope, you must now [define the limits](#) for this promotion.

Defining Benefits of a Promotion

To define the benefits of a promotion:

- In the Benefits section, the **Rule Name**, **Product Family**, and **Product** fields are available only if you selected the *Buy X Get Y* promotion.
In the Benefits section, the **For Every X Criteria**, **Benefit Product**, and **Benefit Type** sub-sections are available only if you select the *For Every X Get X* and *For Every X Get Y* promotions.

- a. In the **Rule Name** field, enter a name for the benefit rule.
- b. From the **Product Family** lookup, search and select the required product families.
- c. From the **Products** lookup, search and select the required products. You can search for a product by its name or code. The search results also display product name and code wherever applicable. If a product has code defined, the search result displays name and code; else the search result displays only the name.

For Buy X Get Y promotions, if the charge types of scope and benefit products are different in price list items, you must select a charge type for the benefit product in the **Charge Type** multi-select box. Otherwise, CPQ does not apply the promotion on the benefit product. CPQ applies the Buy X Get Y promotion to the benefit product regardless of the charge type present on the product you have selected in the Scope and Benefit sections.

Use the following operators to define the benefit for multiple products:

- **Or:** CPQ applies promotion only to the first product that matches the criteria (selected by default).
 - **And:** CPQ applies promotion to all products on the benefit criteria. All benefit products must exist on the cart to apply the promotion.
- d. In the **Charge Type** multiselect box, select the required charge type for the benefit products if the charge types of scope and benefit products are different in price list items.

The **Charge Type** multiselect box is applicable only for Buy X Get Y type of promotions. The charge type of the product you selected from the **Product** drop-down in the Scope section does not have any impact on the charge type you select for benefit product in the **Charge Type** multiselect box in the Benefit section.

- If you select multiple benefit products from the **Products** lookup, you must select multiple charge types in the **Charge Type** multiselect box depending on their charge types in the price list item.
- If you select only one benefit product from the **Products** lookup and its charge type is same as of the charge type of the scope product, CPQ applies promotion on the benefit product even if you do not select a charge type in the **Charge Type** multiselect box.
- If you select only one benefit product from the **Products** lookup and its charge type is different from the charge type of the scope product, you must select a charge type in the **Charge Type** multiselect box. Otherwise, CPQ does not apply promotion on the benefit product. For example, if the charge type of the scope product is Standard Price and the charge type of

the benefit product is License Fee, you must select License Fee for the benefit product in the **Charge Type** multiselect box.

- If the benefit product has two charge types in price list item, you must select only one of the charge types in the **Charge Type** multiselect box depending on which charge type you want CPQ to apply the promotion on the benefit product.

e. Enter the details in the following subsections:


In the Benefits section, the **For Every X Criteria**, **Benefit Product**, and **Benefit Type** sub-sections are available only if you selected the *For Every X Get X* and *For Every X Get Y* promotions.

You can create a promotion of type *For Every X Get X* where X can be multiple products or any product from a group. For example, Mobile Phones are a group of products consisting of ABC 13, ABC 13 Pro, and ABC 13 Max phones. You create a *For Every X Get X* promotion for Mobile Phones as "for every 5 mobile phones get 20% discount on the 6th mobile phone". When the users add any product from Mobile Phones (that are defined in the criteria of the promotion) to the Cart; CPQ applies the defined *For Every X Get X* promotions to those products. For example, if the user adds 6 ABC 13 and 6 ABC 13 Max phones to the Cart, CPQ provides 20% on the 6th 6 ABC 13 and 6th ABC 13 Max phones. However, the users must fulfil the quantity criteria for each product to get the benefit for that product. For example, the users must add 5 ABC 13 mobile phones to get 20% discount on the 6th ABC 13. The users will not get any benefit if they add 4 ABC 13 and 2 ABC Pro phones to the Cart.

From Conga CPQ May '22 release, CPQ does not add the criteria product on the Price Rule entry object. All products in scope are eligible for promotions. After upgrading Conga CPQ to May '22, the existing or previously defined *Every X Get X* promotions do not work with multiple products. You must create a new promotion to support multiple products. However, the existing *Every X Get X* promotions will work for a single product according to their current implementation.

- i. **Criteria Value:** Enter the criteria value on the scope product for the promotion to be applied on the benefit product. The criteria value determines how many quantities of the scope product the user must buy for the promotion to be applicable on the benefit product.
 - **Type:** Select Quantity.
 - **Metric:** Select Quantity.
 - **Value:** Enter a numerical value.
- ii. **Benefit Product:** Select the benefit product on which promotion must be applied.
- iii. **Benefit Type:** Select Price and Quantity.

- iv. **Benefit Quantity:** Enter a numerical value. The benefit quantity determines on how many benefit products the promotion is applicable.
2. From the **Rate Type** drop-down, select a value.
On the **Rate Type** drop-down, CPQ supports only *Single Rate*, *Rate Table - No Tiers*, and *Rate Table - With Tiers* rate types.

 "Rate Table - With Tiers" and "Rate Table - No Tiers" are only supported with Buy X Get X (Line Item) promotions. For all other promotion types, only "Single Rate" is supported.

Rate Type	Description
Single Rate	<p>Selecting this option allows you to define lump sum benefits that do not depend on transaction volume or amount. This is an ideal option when your promotion is not dependent on the amount or quantity of the line items. Select this value if your promotion calculation has no dependency on the amount or quantity ordered.</p> <p>For example, a seasonal promotion that offers 15% off for smartphones.</p> <p>If you select this Rate Type, enter the following values:</p>

Rate Type	Description			
	<table border="1"> <thead> <tr> <th data-bbox="416 322 766 405">Field</th> <th data-bbox="770 322 1431 405">Description</th> </tr> </thead> </table>	Field	Description	
Field	Description			
	Adjustment Type	<p>Select a value to define how you want to apply the benefit. The supported values are:</p> <ul style="list-style-type: none"> • % Discount: A percentage discount specified in the Adjustment Amount field is applied on the option selected in Adjustment Applies To. • Discount Amount: A discount amount specified in the Adjustment Amount field is applied on the option selected in Adjustment Applies To. • % Markup: A percentage markup specified in the Adjustment Amount field is applied on the option selected in Adjustment Applies To. For example, if you want to increase the price of laptops during the month of September, you can apply a percentage markup that adds to the List price. • Markup Amount: A markup amount specified in the Adjustment Amount field is applied on the option selected in Adjustment Applies To. For example, if you want to increase the price of laptops during the month of September, you can apply a markup amount that adds to the List price. • Price Override: The amount specified in the Adjustment Amount field overrides the option selected in Adjustment Applies To. 		
	Adjustment Applies To	The value of this field controls to which price point the adjustments are applied. For example, whether the price discounts are applied to the total net price or the starting price.		

Rate Type	Description	
	Field	Description
	Adjustment Amount	Enter the adjustment amount.
	Benefit Uom	<p>Select the benefit unit of measure for the product. This is not a mandatory field. The default value will be NULL and the user can select anyone from below. If the user has not selected any value here, then the system will consider the Cart line item's selling UOM as the Benefit UOM.</p> <ul style="list-style-type: none"> • Each • Hour • Day • Month • Year • Quarter • Case • Gallon

Rate Type	Description										
Rate Table - No Tiers	<p>Allows you to conditionally define promotional amount. Examples of conditions are products, regions, and account types.</p> <p>If you select this Rate Type, enter the following values:</p> <table border="1" data-bbox="424 483 1425 1798"> <thead> <tr> <th data-bbox="424 483 770 568">Field</th> <th data-bbox="770 483 1425 568">Description</th> </tr> </thead> <tbody> <tr> <td data-bbox="424 568 770 1229">Benefit Uom</td> <td data-bbox="770 568 1425 1229"> Select the benefit unit of measure for the product. This is not a mandatory field. The default value will be NULL and the user can select anyone from below. If the user has not selected any value here, then the system will consider the Cart line item's selling UOM as the Benefit UOM. <ul style="list-style-type: none"> • Each • Hour • Day • Month • Year • Quarter • Case • Gallon </td> </tr> <tr> <td data-bbox="424 1229 770 1592">Adjustment Applies To</td> <td data-bbox="770 1229 1425 1592"> The value of this field controls to which price point the adjustments are applied. The values for tis field are <ul style="list-style-type: none"> • Base Price • List Price • Base Extended Price • Extended Price • Net Unit Price </td> </tr> <tr> <td data-bbox="424 1592 770 1715">Effective Date</td> <td data-bbox="770 1592 1425 1715">Enter the start date for the product from when the Benefits will be applied.</td> </tr> <tr> <td data-bbox="424 1715 770 1798">Expiration Date</td> <td data-bbox="770 1715 1425 1798">Enter the expiration date for the product.</td> </tr> </tbody> </table>	Field	Description	Benefit Uom	Select the benefit unit of measure for the product. This is not a mandatory field. The default value will be NULL and the user can select anyone from below. If the user has not selected any value here, then the system will consider the Cart line item's selling UOM as the Benefit UOM. <ul style="list-style-type: none"> • Each • Hour • Day • Month • Year • Quarter • Case • Gallon 	Adjustment Applies To	The value of this field controls to which price point the adjustments are applied. The values for tis field are <ul style="list-style-type: none"> • Base Price • List Price • Base Extended Price • Extended Price • Net Unit Price 	Effective Date	Enter the start date for the product from when the Benefits will be applied.	Expiration Date	Enter the expiration date for the product.
Field	Description										
Benefit Uom	Select the benefit unit of measure for the product. This is not a mandatory field. The default value will be NULL and the user can select anyone from below. If the user has not selected any value here, then the system will consider the Cart line item's selling UOM as the Benefit UOM. <ul style="list-style-type: none"> • Each • Hour • Day • Month • Year • Quarter • Case • Gallon 										
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Effective Date	Enter the start date for the product from when the Benefits will be applied.										
Expiration Date	Enter the expiration date for the product.										

Rate Type	Description							
	<table border="1"> <thead> <tr> <th data-bbox="416 322 766 405">Field</th> <th data-bbox="770 322 1436 405">Description</th> </tr> </thead> </table>	Field	Description					
Field	Description							
	Rate Table Columns	<p>This field is used to define the conditions to be used with the rate table.</p> <p>If you need to define different promotions for different products, make sure the product column is added. If you would like to add another condition, make sure to select the value from the picklist and click the Update button.</p>						
	Rate Table	<p>As per the passed Rate Table Column values, the Rate Tables should be created. One or more than one entries can be provided in the Rate Tables by clicking on '+' icon and you can delete a particular row by clicking the 'Delete' icon.</p> <p>In the Create Structure, enter the following details:</p> <table border="1" data-bbox="786 1070 1410 1686"> <thead> <tr> <th data-bbox="791 1077 1046 1160">Field</th> <th data-bbox="1046 1077 1406 1160">Description</th> </tr> </thead> <tbody> <tr> <td data-bbox="791 1160 1046 1563">Rate Value Type</td> <td data-bbox="1046 1160 1406 1563"> From the below values, anyone value can be selected: <ul style="list-style-type: none"> • % Discount • Discount Amount • % Markup • Markup Amount • Price Override </td> </tr> <tr> <td data-bbox="791 1563 1046 1686">Adjustment Amount</td> <td data-bbox="1046 1563 1406 1686">Enter the adjustment amount.</td> </tr> </tbody> </table> <p>Once the Rate Table is created, you can view the structure by clicking on 'View Structure'. One or more than one entries can be provided in the Rate Table Structure by clicking on '+' icon and you can delete a particular row by clicking the 'Delete' icon against the row.</p>	Field	Description	Rate Value Type	From the below values, anyone value can be selected: <ul style="list-style-type: none"> • % Discount • Discount Amount • % Markup • Markup Amount • Price Override 	Adjustment Amount	Enter the adjustment amount.
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Adjustment Amount	Enter the adjustment amount.							

Rate Type	Description						
Rate Table - With Tiers	<p>Selecting this option allows you to define promotional adjustment that depends on transaction volume or revenue. If you select this Rate Type, enter the following values:</p> <table border="1" data-bbox="424 465 1425 1541"> <thead> <tr> <th data-bbox="424 465 783 555">Field</th> <th data-bbox="783 465 1425 555">Description</th> </tr> </thead> <tbody> <tr> <td data-bbox="424 555 783 1032">Rate Table - Tier Type</td> <td data-bbox="783 555 1425 1032"> <p>The value of this field controls how the promotion is calculated.</p> <p><i>Rate Per Each Tier</i> - Promotion is calculated at different pricing levels. The promotion amount for each unit depends on which tier the unit falls under. This is the most common scenario for customer promotion calculation.</p> <p><i>Highest Tier Rate</i> - Promotion is calculated based on the total volume or revenue. Each unit receives the same promotional amount.</p> </td> </tr> <tr> <td data-bbox="424 1032 783 1541">Tier Metric Type</td> <td data-bbox="783 1032 1425 1541"> <p>The value of this field controls which metric will be used to qualify for tiers.</p> <p><i>Volume</i> - Volume or quantities are used to qualify for tiers. Select this value if your promotion varies based on the purchase quantities but has no dependencies on the dates.</p> <p><i>Revenue</i> - Total quote amount is used to qualify for tiers. Select this value if your promotion varies based on the revenue amount but not on the dates.</p> </td> </tr> </tbody> </table>	Field	Description	Rate Table - Tier Type	<p>The value of this field controls how the promotion is calculated.</p> <p><i>Rate Per Each Tier</i> - Promotion is calculated at different pricing levels. The promotion amount for each unit depends on which tier the unit falls under. This is the most common scenario for customer promotion calculation.</p> <p><i>Highest Tier Rate</i> - Promotion is calculated based on the total volume or revenue. Each unit receives the same promotional amount.</p>	Tier Metric Type	<p>The value of this field controls which metric will be used to qualify for tiers.</p> <p><i>Volume</i> - Volume or quantities are used to qualify for tiers. Select this value if your promotion varies based on the purchase quantities but has no dependencies on the dates.</p> <p><i>Revenue</i> - Total quote amount is used to qualify for tiers. Select this value if your promotion varies based on the revenue amount but not on the dates.</p>
Field	Description						
Rate Table - Tier Type	<p>The value of this field controls how the promotion is calculated.</p> <p><i>Rate Per Each Tier</i> - Promotion is calculated at different pricing levels. The promotion amount for each unit depends on which tier the unit falls under. This is the most common scenario for customer promotion calculation.</p> <p><i>Highest Tier Rate</i> - Promotion is calculated based on the total volume or revenue. Each unit receives the same promotional amount.</p>						
Tier Metric Type	<p>The value of this field controls which metric will be used to qualify for tiers.</p> <p><i>Volume</i> - Volume or quantities are used to qualify for tiers. Select this value if your promotion varies based on the purchase quantities but has no dependencies on the dates.</p> <p><i>Revenue</i> - Total quote amount is used to qualify for tiers. Select this value if your promotion varies based on the revenue amount but not on the dates.</p>						

Rate Type	Description	
	Field	Description
	Benefit Uom	<p>Select the benefit unit of measure for the product. This is not a mandatory field. The default value will be NULL and the user can select anyone from below. If the user has not selected any value here, then the system will consider the Cart line item's selling UOM as the Benefit UOM.</p> <ul style="list-style-type: none"> • Each • Hour • Day • Month • Year • Quarter • Case • Gallon
	Metric Calculation Period	<p>Select a period over which the tier metric is aggregated. The supported value is <i>No Rollup</i>, which means the tier metric is based on the value from individual transaction only.</p>
	Metric Value Source	<p>The value from this field determines the source based on which the volume or revenue is calculated. The calculated volume or revenue amount is used to determine the tier.</p> <p>Select this value if the Tier Metric Type is Volume. Once Quantity is selected, you will see that in the Rate Table Structure, the "from" and "to" columns become "From Quantity" and "To Quantity".</p>

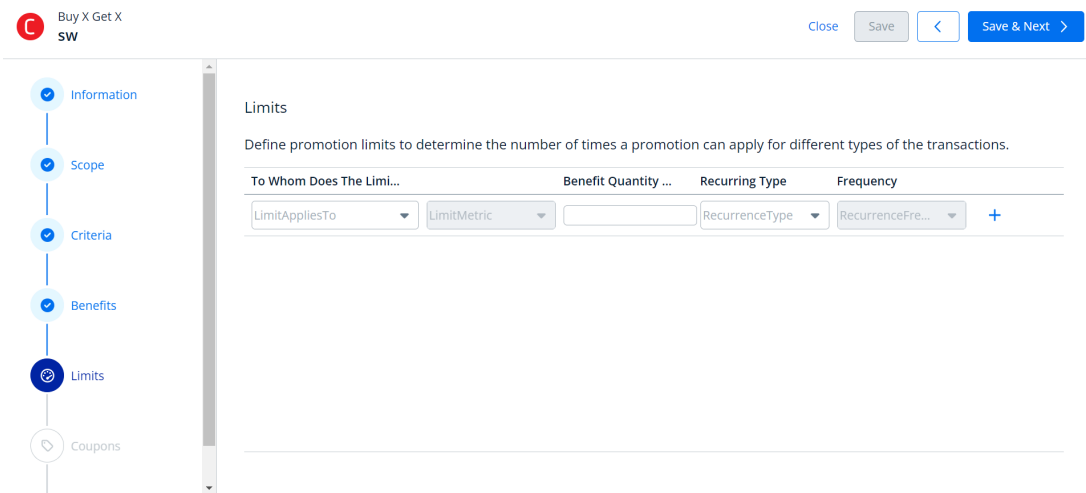
Rate Type	Description	
	Field	Description
	Adjustment Applies To	The value of this field controls to which price point the adjustments are applied. The values for this field are <ul style="list-style-type: none"> • Base Price • List Price • Base Extended Price • Extended Price • Net Unit Price
	Rate Table Columns	This field is used to define the conditions to be used with the rate table. If you need to define different promotions for different products, make sure the product column is added. If you would like to add another condition, make sure to select the value from the picklist and click the Update button.

Rate Type	Description									
	<table border="1"> <thead> <tr> <th data-bbox="424 333 777 405">Field</th> <th data-bbox="790 333 1434 405">Description</th> </tr> </thead> </table>	Field	Description	<p data-bbox="796 427 1412 618">As per the passed Rate Table Column values, the Rate Tables should be created. One or more than one entries can be provided in the Rate Tables by clicking on '+' icon and you can delete a particular row by clicking the 'Delete' icon.</p> <p data-bbox="796 640 1342 712">In the Create Structure, enter the following details:</p> <table border="1" data-bbox="796 734 1412 1386"> <thead> <tr> <th data-bbox="802 743 1054 824">Field</th> <th data-bbox="1061 743 1406 824">Description</th> </tr> </thead> <tbody> <tr> <td data-bbox="802 833 1054 1263">Rate Value Type</td> <td data-bbox="1061 833 1406 1263"> <p data-bbox="1067 842 1367 949">From the below values, anyone value can be selected:</p> <ul data-bbox="1166 976 1374 1245" style="list-style-type: none"> • % Discount • Discount Amount • % Markup • Markup Amount • Price Override </td> </tr> <tr> <td data-bbox="802 1272 1054 1379">Adjustment Amount</td> <td data-bbox="1061 1272 1406 1379">Enter the adjustment amount.</td> </tr> </tbody> </table> <p data-bbox="796 1395 1412 1626">Once the Rate Table is created, you can view the structure by clicking on 'View Structure'. One or more than one entries can be provided in the Rate Table Structure by clicking on '+' icon and you can delete a particular row by clicking the 'Delete' icon against the row.</p>	Field	Description	Rate Value Type	<p data-bbox="1067 842 1367 949">From the below values, anyone value can be selected:</p> <ul data-bbox="1166 976 1374 1245" style="list-style-type: none"> • % Discount • Discount Amount • % Markup • Markup Amount • Price Override 	Adjustment Amount	Enter the adjustment amount.
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Adjustment Amount	Enter the adjustment amount.									

3. Click **Save** to save the changes or click **Save & Continue** to move to the next tab.

Defining Limits of a Promotion

You must define promotion limits to determine the number of times your customer can apply a promotion for different types of the transactions.



To define the limit of a promotion,

1. Enter values for the fields described in the following table:

Field Name	Description
To Whom Does the Limit Apply?	Enables you specify the object on which the limit is applied. The objects on which limit is applicable on are <i>Account</i> , <i>User</i> , and <i>Contact</i> .
Benefit Quantity	Specifies what will be the parameter on which the limit is applicable. <i>Benefit Quantity</i> : Specifies that the discount would be applied on a fixed quantity.
Benefit Quantity Limit	Specifies the value of the Benefit Quantity.
Recurring Type	Specifies whether the limit applied is one time or on a recurring basis.
Frequency	Specifies the frequency at which the applied incentives are limited. Available frequencies are <i>Monthly</i> , <i>Quarterly</i> , <i>Half Yearly</i> , <i>Yearly</i> , <i>Order</i> .

2. Click **Save** to save the changes or click **Save & Next** to move to the next tab.


Expected Behavior

Options Selected	Expected behavior
Auto Apply deselected, Combine with Other incentives selected	<p>You can build a User Interface to display the “Show Available Promotions” list using the Promotions API, which displays non-auto applied promotions.</p> <p>The user can then select one or multiple promotions to be applied.</p>
Auto Apply deselected, combine with other incentives deselected	<p>If a user provides multiple promo codes as a comma-separated list, the highest priority promotion is selected and applied from the list of promotions provided in the comma-separated list.</p>
Auto-Apply selected, combine with other incentives deselected	<p>If two or more promotions are applicable, the system picks the promotion with the highest priority and applies it.</p>
Auto-apply selected, combine with other incentives selected	<p>All promo codes fulfilling the criteria will be applied. If one or more promo codes have priority 1 which is applicable in a scenario all the promotions are applied. Suppose for a given scenario there are 4 promo codes which are applicable having priority 1,1,2,2 all four are applied.</p> <p>Pricing is not stacked, so if all the four qualify and allow others to be applied then all four are applied.</p> <p>If some of the promotions do not allow others to be applied then those promotions are filtered out.</p>

Defining Coupons of a Promotion





Coupons are generally alphanumeric codes that correspond to a promotion. With Conga Promotions, you can now create multiple coupon codes for potential customers to promote your business and specific products in your inventory.

After you identify potential end customers in a target market, you can use coupons to track how customers use incentives, how you can optimize your promotions, and how you can re-target your customers. You can generate multiple coupon codes to share the range with your marketing team.

 To create coupons for this promotion, set **Auto Apply?** to *Off* on the Information page.

Viewing Coupons

You can view all coupons in Card and List view.

View Type	Description
Card View	<p>Card view displays Coupon details in individual card format. It is a default view on UI. A card shows all the details of the existing coupon.</p> <ul style="list-style-type: none"> • Click Card view icon () to view coupon in card format. • Click the ellipsis () icon to edit or delete the coupon. • Use Active toggle button to enable/disable the coupon.
List View	<p>List view displays coupon in a list. It is a default view on UI. Click List view icon () to view coupon in a list.</p> <p>For this view, refer the following sections:</p> <ul style="list-style-type: none"> • Click the ellipsis () icon to edit or delete the coupon. • Edit any field for the coupon. • Mass Action is enabled.

To create a new coupon

1. On the coupons page, click **Create Coupon** to raise a Coupon Quantity pop-up.
2. Enter the number of coupons you want to create and click **Create**. The system generates coupons based on the number you entered.
3. Enter values for the fields described in the following table:
 These fields act as filter criteria as well. For example, the coupon-assigned account or Incentive user needs to match the account field value specified on the quote or the logged-in user respectively. If the Account field value on the quote is missing, the coupon assigned to the account needs to match the account linked to the opportunity.





Field	Description
Start Date	The start date for the coupon.
End Date	The last date this coupon is valid.

Field	Description
Limit	The number of times you can use this coupon.
Price Dimension	Select any type of price dimension associated with user or an account.
Assigned To	Select the object to which the coupon is assigned to. The values will be shown according to the value selected for price dimension.
Active	Select the checkbox to activate the coupon.

- Click **Save** to save the changes or click **Save & Continue** to move to the next tab.

Mass Actions: Delete, Edit, and Export

The mass action feature allows you to export, edit, or delete the selected coupons in one instance.

- Click the checkbox beside Coupon Code column. You can select one coupon, multiple coupons, or all the coupons.
- Click the ( ) icon to export the selected coupon as CSV or Excel file format.
- Click the edit () icon to edit the Start Date, End Date, Price Dimension, or Limit of the selected coupons. You can also make them active or inactive.
 - An Edit (number of coupons selected) Coupons pop-up will appear.
 - Make necessary changes and click Save.
 - A Delete Coupons pop-up will appear. Click the delete () icon to delete the selected coupons.
 - Click Confirm.

Editing a Promotion

After you have created a promotion, you can edit the same whenever required.

To edit a promotion




- Go to ADMIN SETUP > Pricing Administration > Promotions. The Promotions page is displayed.
- Search for the promotion you want to edit.
- Click the promotion name. The Summary screen is displayed.

4. You can expand each section to see the details.
5. Click **Edit** to modify the expanded section. For example, expand **Benefits** section for a promotion and click **Edit** to modify the benefits that are applied to the selected promotion.
6. Click **Save & Next** to move to the next section.
7. Click **Save** to save the changes to the promotion.

Deleting Promotion

You can delete promotions that are no longer required for your business requirements.

To delete a promotion



1. Go to **ADMIN SETUP > Pricing Administration > Promotion**. The Promotions page is displayed.
2. Search for the promotion and do one of the following:
 - To delete a single promotion, click the ellipsis icon () next to the rollup name, and click **Delete**.
 - To delete multiple promotions, click the checkboxes next to the name column, and click the () icon.
 - To delete all the promotions, click the checkbox in the header row next to the name column, and click the () icon.
3. Click **Confirm**.

Managing promotions

Exporting Promotions

Mass Actions: Export

The mass action feature allows you to export the selected coupons in one instance.

- Click the checkbox beside Promotion Code column. You can select one promotion, multiple promotions, or all the promotions.
- Click the export ( ) icon to export the selected promotions as CSV or Excel file format.

The file gets downloaded to your local storage.

Managing the Price Waterfall

Price Waterfall is the industry standard for Price and Margin calculation. Price waterfall defines a sequence to handle different prices with the target of reaching the net price.

A well-defined Price Waterfall provides transparency and high visibility of pricing calculation and helps protect margins and avoid incorrect pricing.

Price Waterfall comes with features for transparency and high visibility in pricing calculation and protecting margins, avoiding incorrect pricing. In addition, Price Waterfall defines a sequence to treat different prices with the end goal of arriving at the net price charged to the customer.

Price Waterfall enables administrators to configure the price execution flow and set the groundwork for Conga's Price Waterfall feature to display detailed pricing steps for end-users to visualize. Price waterfall is a tool that provides users with detailed information on how much revenue the company is generating from a transaction and the pocket margin of that transaction. The waterfall is typically represented in a column chart consisting of critical price or margin points and any adjustments that were applied to the list price to arrive at the final price or margin.

The advantages of the price waterfall functionalities are as follows:



- Provides Sales Representatives with the ability to drill down on any price point visible to them so that they can make better decisions and better communicate the deal to customers giving them more leverage during a negotiation.
- Provides approvers and the deal desk with a complete picture of the different price points, preapproved and non-standard adjustments, and costs to better analyze the health of the deal.
- Enables cost accountants and controllers ability to drill down on the cost (if cost is included as part of the price waterfall) to ensure that the deal's profitability is accurately calculated.

Navigating the Price Waterfall Page

When you launch the Price Waterfall page on the UI, all the existing price waterfalls are listed on this page along with their details. There are various functionalities available for you to manage the field sets.

Viewing Price Waterfall

You can view all price waterfall in Card and List view.


View Type	Description
Card View	<p>Card view displays price waterfall details in individual card format. It is a default view on UI. A card shows the details such as Title, Description, Effective & Expiration Date, Sequence, and Is Active?.</p> <ul style="list-style-type: none"> • Click Card view icon () to view price waterfall in card format. • Click the card title to open the card. • Use Is Active? toggle button to enable/disable the price waterfall.
List View	<p>List view displays price waterfall in a list. Click List view icon () to view price waterfall in a list.</p> <p>For this view, refer the following sections:</p> <ul style="list-style-type: none"> • Price Waterfall Search in List View • Sorting Price Waterfall List • Items Per Page in List View

Price Waterfall Search in List View

You can narrow the price waterfall list using the search feature in list view. You can either define search criteria to search for a range of price waterfalls or use the price waterfall search option.

Basic Search


In basic search, you can search for a price waterfall using keywords. For example, you can search using the name of the price waterfall.

1. In the **Search this list** field, enter a keyword related to your price waterfall details such as price waterfall name.
2. Click the search icon () or press **Enter**. CPQ returns all price waterfalls that contain that keyword in the price waterfall names.

Managing Views

You can manage column width, control which columns are displayed in the grid, freeze/pin a column range, or rearrange the column order. You can also filter the view of records in the grid by performing a keyword search, filtering the list by column value, or applying one or more advanced filters and filter logic. For more information, see [Managing the View Settings](#) and [Filtering the Records](#).

Actions Available on this Page

- Click **Create New** to create a new price waterfall.
- Click the More icon () next to the price waterfall name to edit an existing price waterfall.
- Click the price waterfall name link to open the price waterfall Details page.
- Export the selected price waterfall. For more information, see [Exporting Records](#).

Navigating the Price Waterfalls Details page

1. Go to ADMIN SETUP > Pricing Administration > Price Waterfall > Price Waterfall.
2. Search for the price waterfall you want to update.
3. Click the price waterfalls name link to open the Price Waterfalls details page.

This section provides information on managing price waterfall.

- [Creating the Price Waterfall](#)
- [Creating New Price Point](#)
- [Managing Price Waterfall Rulesets](#)
- [Deleting the Price Waterfall](#)

Creating the Price Waterfall

You can create one or multiple price waterfall as required.

To create a price waterfall

1. Go to ADMIN SETUP> Pricing Administration > Price Waterfalls > Price Waterfall.
The **Price Waterfall** page is displayed.
2. Click the **Create New** button. The New **Price Waterfall** page is displayed.
3. Enter the following details:

Field	Description
Waterfall Name	Enter a name for the Price waterfall.
Sequence	Give a number sequence to the new Price waterfall. (Avoid duplicate sequence numbers. While the system doesn't enforce this restriction, if duplicates occur, random priority will be assigned within the identical sequences)

Field	Description
Description	Enter a description for the Price waterfall.
Effective Date	Select the date from which the Price waterfall will be active.
Expiration Date	Select the expiration date for the Price waterfall. The date must be greater than the effective date if both are defined.
Active	Toggle button to show whether the Price waterfall is active.

 you can define a criteria once the Waterfall is created.

4. Click **Continue**.

The application navigates you to the Price Points screen to define the points.

[Defining Price Points](#)

[Creating New Price Point](#)


[Managing the Price Waterfall](#)


Defining Price Points

You can define the price points to new price waterfall as per the requirements.

To define price points to new price waterfall

When you click Continue from New Price Waterfall screen, the application navigates you to define price points. You can add and define price points to be used in waterfall. The List Price and Base Price are set by default, you can add other custom price points and set one of them as Net Price.

1. Click the text box in the Price Point Name column and select the Custom Price Point from the list.
2. Net Price: Define one of the Custom Price Point as Net Price, which will be used for downstream net price calculation. Move the slider to enable the Is net price option.
3. Click the '+' icon to add more Custom Price Points. To create new price points, see [Creating New Price Point](#).
4. Click the delete  icon to delete the Custom Price Point.
5. Click **Create**.


- You can set one of the price points as the net price that is used for downstream integration (Billing, ABO, etc.) except list price and base price
- Setting up one price point as net price is mandatory.
- By default, Net Price is enabled for the first price point and will allow you to change to any other custom price point,
- Turning on net price to any other price point will turn off the previously enabled net price.
- You can adjust the sequence of price points by moving the  icon. However, the net price and base price would be in its default position.



The application creates a new price waterfall. Once the new price waterfall created, you can access the price point for the desired price waterfall.

1. Click the desired price waterfall to open it.
2. Click **Price Points** tab to view the price points.
3. Click **+** icon to define new price points.
4. Enter the following details:

Field	Description
Price Point Name	Select a price points from the list of price points created in the Waterfall Charts list page. The List Price and Base Price are added by default and cannot not be modified or deleted. You can create custom price points on the Waterfall chart list page by clicking Price Points button. You can see the list of price points on the Price points screen. For more information, see Creating New Price Point .
Net Price	Enable and set one of the price points as the Net Price which is used for downstream integration (Billing, ABO, etc.). You cannot set the List price and Base Price as the Net Price. By default, Net Price will be enabled for the first price point. You can change it to any other custom price point. Turning ON the net price to any other price point should turn OFF the previously enabled because we can have only one net price enabled price point.

Field	Description
Display Name	<p>Use the "Display Name" feature to create a custom label for the price point, which will appear on the waterfall chart to represent the price point. By default, the display name matches the name of the price point.</p> <p>You can edit the display name by clicking on it. To edit the display name, follow the steps below:</p> <ol style="list-style-type: none"> a. Select the display name and enter the desired new display name. b. Click Save.

5. Click the delete  icon to remove a price point.
6. Click **Save**.


 You can adjust the sequences of price points by moving the  icon. However, the net price and base price would be in its default position.

[Creating the Price Waterfall](#)


[Creating New Price Point](#)


Creating Price Waterfall Charts



To create a price waterfall chart

1. Go to ADMIN SETUP > Pricing Administration > Price Waterfall. The Price Waterfall page is displayed.
2. Click the required price waterfall name link to open the Price Waterfalls details page.
3. Click the Waterfalls Charts tab.
 - If there are existing price rules, you can perform the following actions on the list of rules:
 - i. Click **Create New Chart**. The Create New Waterfall Chart pop-up is displayed. Go to step 4.
 - ii. Click the required waterfall chart name link to open the waterfall chart details page.
 - iii. Rearrange the sequence of rules using the  icon.
 - iv. Click the ellipsis icon for the waterfall chart and click **Delete**.
 - If there are no unsaved changes, the Delete Price Rule pop-up is displayed. Click **Confirm**.

- If there are unsaved changes, the a pop-up is displayed prompting your confirmation. Click **Discard Changes**. The Delete Price Rule pop-up is displayed. Click **Confirm**.
 - v. Click the ellipsis icon for the waterfall chart and click **Clone**.
 - By default, the Chart Name will be *Clone-The chart name from which you have cloned* and the sequence will be *1+ The chart sequence from which you have cloned*.
 - Click **Clone**.
 - If there are no charts created, click **Create New**.
4. Enter the following details:

Field	Description
Chart Name	Enter the name of the waterfall chart.
Sequence	Give a number sequence to the new waterfall chart. (Avoid duplicate sequence numbers. While the system doesn't enforce this restriction, if duplicates occur, random priority is assigned within the identical sequences)
Description	Enter a description for the waterfall chart. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> If you enter a description to a price waterfall chart, then the info icon associates to the Waterfall Chart's left panel.</p> </div>
Is Active?	Toggle on if the waterfall chart is to be set active.

5. Click **Create**.
6. You can add the criteria using standard criteria model.
- a. Click **Add Criteria**. The Chart Criteria pop-up is displayed.
 - b. On the Line Items tab, enter the following details:
 - i. **Field**: Select a field on the product. You can select custom fields also.
 - ii. **Operator**: Select an operator.
 - iii. **Value**: Enter a value.
 - iv. Click **Add Criteria** to add one more criteria.
 - v. Click the remove icon  to remove a criteria.
 - vi. Click **Remove All** to remove all criteria.
 - vii. Click **Save**.
 - c. On the Product Attributes tab, enter the following details:
 - i. **Field**: Select a field on the product. You can select custom fields also.

- ii. **Operator:** Select an operator.
 - iii. **Value:** Enter a value.
 - iv. Click **Add Criteria** to add one more criteria.
 - v. Click the remove icon  to remove a criteria.
 - vi. Click **Remove All** to remove all criteria.
 - vii. Click **Save**.
 - d. On the User Role tab, enter the following details:
 - i. **Field:** Select a field on the product. You can select custom fields also.
 - ii. **Operator:** Select an operator.
 - iii. **Value:** Enter a value.
 - iv. Click **Add Criteria** to add one more criteria.
 - v. Click the remove icon  to remove a criteria.
 - vi. Click **Remove All** to remove all criteria.
 - vii. Click **Save**.
 - e. Turn the **Logic** button on and enter a value in the Logic field when you add multiple conditions. When there is more than one condition for a constraint rule, this field defines when to consider one or more of the conditions using AND/OR association. The sequence number defined in the **Condition** column is used as an identifier of the condition.
7. Under **Manage Price Points section:**

The manage price point enables you to set the visibility restriction on price points. It is advised to refrain from eliminating intermediate price points.

 - a. Price point restriction will have all the price point listed down as defined in the waterfall.
 - b. By default, all the price points will be selected and user can deselect the price points which are not required for the respective chart.
 - c. The **Net Price** tag will be defined with the associated price point.
8. Under **Additional Details:**

This section will allow you to select the line item fields which you want to display below waterfall chart as additional detail for the line item and make it editable if you want user to modify on the same page.

Creating New Price Point

You can create new price points as per the requirements.

To create a new price point

1. Go to ADMIN SETUP > Pricing Administration > Price Waterfalls > Price Waterfall. The **Price Waterfall** page is displayed.
2. Click **Price Points** option.
3. Enter a Enter the name of the new price point in the **New Price Point Name** field.
4. Click **Create**.

Managing Price Waterfall Rulesets

The Price Waterfall Ruleset enables the specification of adjustments tailored to particular price points. By leveraging criteria and scope parameters, one can refine the adjustment's relevance to meet specific business requirements.

Navigating the Price Waterfall Rulesets Page


When you launch the price waterfall page on the UI, click the price waterfall ruleset tab. There are various functionalities available for you to manage the waterfall rulesets.

Waterfall Rulesets Search

You can narrow down the waterfall rulesets list using the search feature. You can either define search criteria to search for a range of waterfall rulesets or use the waterfall ruleset search option.

Basic Search

In basic search, you can search for a waterfall ruleset using keywords. For example, you can search using the name of the waterfall ruleset.

1. In the **Search this list** field, enter a keyword related to your waterfall ruleset details such as waterfall ruleset name.
2. Click the search icon  or press Enter. CPQ returns all waterfall rulesets that contain that keyword in the waterfall ruleset names.

Advanced Search

In advanced search, you can search for a waterfall ruleset using a search query. The search query uses options provided in the Field, Operator, and Value and displays a search result that matches the criteria.

1. Click the Advanced Search icon . The Advanced Search pop-up is displayed.
2. Enter the following details:

- a. **Field:** All waterfall ruleset fields are available in the drop-down list such as Text, Checkbox, Date, Date/Time, Number, Percent, Picklist, Multi-Select Picklist, Currency.
 - b. **Operator:** Operators that are available for selection helps create the filter expression. Operators are displayed based on the field types. For example, a picklist value will display equal to and not equal operators and a text field will display equal to, not equal to, starts with, contain, does not contain operators. If it is a multi-value picklist, the application displays include and does not include operators.
 - c. **Value:** Enter a value.
3. Click **Add Criteria** if you want add more criteria in the advanced search.
 4. Turn the **Logic** button on if you have more than one criteria and enter a value in the **Logic** field.
 5. Click **Apply** to enable the search filter. CPQ returns all waterfall rulesets that match the criteria.

View Setting

In view setting, you can select the fields to be displayed in the list of waterfall rulesets. You can freeze the columns as well. You can move the fields in the available and showing sections to configure the view setting.

Sorting Waterfall Rulesets

You can sort the waterfall rulesets list by clicking the column names. The waterfall rulesets are sorted alphabetically in ascending order using the waterfall ruleset name. Every time you click the column name, the sorting switches between ascending and descending order. You can adjust the column width by dragging the columns. Hover near the column boundaries till two-way arrow appears. Click when the arrow appears and drag left or right to adjust the column width.

Items per page


At the bottom of the page, you can see the total count of waterfall rulesets available. You can control the number of waterfall rulesets to be displayed on each page. You can select the number of waterfall rulesets from a predefined list. You cannot configure this list. By default, you see 20 records on each page.

By default, you can sort 10, 20, 30, 50, and 100 waterfall rulesets per page using the **Rows per page** drop-down. This feature works in association with the search and filter functions to display search records per page. You can use the < and > buttons to move to the next or the previous pages. You can also jump to a certain page using the page search component.

Navigating the waterfall rulesets Details page

1. Go to **ADMIN SETUP > Pricing Administration > Price Waterfall > Waterfall Rulesets**
2. Search for the waterfall ruleset you want to update.
3. Click the waterfall rulesets name link to open the waterfall rulesets details page.

Actions available on this page

- Create new price waterfall rulesets.
- On the Details tab, edit the waterfall ruleset details.
- On the Features tab, add or remove features in the waterfall ruleset.
 - a. To add a new Feature, click the **Add New** button, and enter the field details.
 - b. To remove an existing feature, click  button.
- Click **Save**.
- Export the selected waterfall rules. For more information, see [Exporting Records](#).



Creating a Price Waterfall Ruleset

To create a price waterfall ruleset


1. Go to **ADMIN SETUP > Pricing Administration > Price Waterfall > Price Waterfall Rulesets**. The Price Waterfall Rulesets page is displayed.
2. Click **Create New**. The New Price Ruleset pop-up is displayed.
3. Enter the following details:

Field	Description
Ruleset Name	Enter a mandatory name for the ruleset.
Sequence	Enter a mandatory Sequence in which the system will evaluate multiple rulesets. Typically, you will perform line item adjustments first and then any summary adjustments
Description	Enter a description for the ruleset.
Active	Turn this setting on to set the ruleset as active.
Stop Processing More Rules	Turn this setting on to indicate that if the ruleset is satisfied, CPQ does not process any more rules.

Field	Description
Enable Data Range in Rule Entry	Turn this setting on to set the effective date and expiration date on the rule entry.

4. Click **Save**. A new waterfall price ruleset is created and you are redirected to the price waterfall ruleset details page.
5. On the Details tab, you can update the details if required.
6. Click the Condition & Criteria tab and enter the following details:
7. Under the Conditions section:
 - a. In the **Price List** field, search and select a price list.
 - b. On the **Product Family** drop-down, select a product family.
 - c. On the **Product Category** drop-down, select a product category.
 - d. On the **Product Group** drop-down, select a product group.
 - e. On the **Category** drop-down, select a category.
 - f. On the **Charge Type** drop-down, select a charge type.
8. Under the Criteria section, do the following steps to add a ruleset criteria.
 - a. Click **Add Criteria**. The Charge Type Criteria pop-up is displayed.
 - b. On the Line Items tab, enter the following details:
 - i. **Field**: Select a field on the product. You can select custom fields also.
 - ii. **Operator**: Select an operator.
 - iii. **Value**: Enter a value.
 - iv. Click **Add Criteria** to add one more criteria.
 - v. Click the remove icon () to remove a criteria.
 - vi. Click **Remove All** to remove all criteria.
 - vii. Turn the **Logic** button on and enter a value in the **Logic** field when you add multiple criteria.
 - viii. Click **Save**.
 - c. On the Product Attributes tab, enter the following details:
 - i. **Field**: Select a field on the product. You can select custom fields also.
 - ii. **Operator**: Select an operator.
 - iii. **Value**: Enter a value.
 - iv. Click **Add Criteria** to add one more criteria.
 - v. Click the remove icon () to remove a criteria.
 - vi. Click **Remove All** to remove all criteria
 - vii. Turn the **Logic** button on and enter a value in the **Logic** field when you add multiple criteria.
 - viii. Click **Save**.
 - d. Click **Save** on the price ruleset details page.

To delete a price ruleset

1. Go to ADMIN SETUP > Pricing Administration > Price Rulesets. The Price Rulesets page is displayed.
2. Search for the price ruleset you want to delete.
3. Click the ellipsis icon () next to the price ruleset name and click **Delete**. The Delete Price Ruleset pop-up is displayed.
4. Click **Confirm**.

Creating a Price Waterfall Rule

The *Waterfall Rule* enables you to provide target adjustments to specific rulesets in the price waterfall chart. Although the standard price rules are applied to the *Base Price*, you can now target any custom waterfall ruleset that you want by using the price waterfall rule. When defining any price waterfall rule, you must associate at least one price point to a price waterfall rule. These rules are executed (subject to fulfilling other criteria) and shown as adjustments specific to only those price points in the price waterfall chart.

You can associate multiple waterfall rules to a price waterfall ruleset or through to a product. Price matrices can be defined in price rules as well as conditional price pipeline rules (rules that use Boolean logic such as AND/OR). The price waterfall rule can be dimensional, which uses a similar concept to Price Matrices, or Conditional, which relates to fields for pricing adjustments.


One ruleset can have multiple rules and is evaluated in order of the rule sequence. A rule can be dimensional or conditional. A price pipeline rule determines the actual price adjustment made.

Price Rule Search

You can narrow down the price rules using the search feature. You can either define search criteria to search for a range of price rules or use the price rule search option.

Basic Search

In basic search, you can search for a price rule using keywords. For example, you can search using the name of the price rule.


1. In the **Search this list** field, enter a keyword related to your price rule name.
2. Click the search icon  or press Enter. CPQ returns all price dimensions that contain that keyword in the price dimension names.

Sorting Price Rule

You can sort the price rules by clicking the column names. The price rules are sorted alphabetically. Every time you click the column name, the sorting switches between

ascending and descending order. You can adjust the column width by dragging the columns. Hover near the column boundaries till two-way arrow appears. Click when the arrow appears and drag left or right to adjust the column width.

To create a price rule

1. Go to ADMIN SETUP > Pricing Administration > Price Waterfall Rulesets. The Price Waterfall Rulesets page is displayed.
2. Click the required price waterfall ruleset name link to open the Price Waterfall Rulesets details page.
3. Click the Price Waterfall Rules tab.
 - If there are existing price waterfall rules, you can perform the following actions on the list of rules:
 - i. Click **Create New**. The Create New Price Waterfall Rule pop-up is displayed. Go to step 4.
 - ii. Click the required price waterfall rule name link to open the price waterfall rule details page.
 - iii. Rearrange the sequence of waterfall rules using the  icon.
 - iv. Turn the **Is Active?** setting on to make the waterfall rule active.
 - v. Click the ellipsis icon for the waterfall rule and click **Delete**.
 - If there are no unsaved changes, the Delete Price Waterfall Rule pop-up is displayed. Click **Confirm**.
 - If there are unsaved changes, the a pop-up is displayed prompting your confirmation. Click Discard Changes. The Delete Price Waterfall Rule pop-up is displayed. Click **Confirm**.
 - If there are no waterfall rules created, click **Create New** on the required waterfall rule type.
 - i. Dimension
 - ii. Condition
4. Enter the following details:

Field	Setting
Rule Name	Enter a mandatory rule name.
Sequence	Enter a mandatory sequence for the rule.
Description	Enter a description for the rule.
Active	Turn this setting on to make the rule active.


Field	Setting
Stop Processing More Rules	Turn this setting to indicate that if the ruleset is satisfied, CPQ does not process any more rules.
Target Price Point	<p>Select the price point from the list to associate with the rule.</p> <div data-bbox="679 562 1426 1003" style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>i Target Price Point(s) - The Target Price Point specifies the position on the waterfall sequence prior to which the adjustment is applied. If multiple price points within the same waterfall are included, the adjustment is applied before the first price point in the sequence, disregarding others designated as Target Price Points. However, if the price points belong to different waterfalls, the same rule applies to multiple price points within each respective waterfall.</p> </div>

Field	Setting								
Adjustment Applies To	<p data-bbox="676 338 1414 524">select an option to which the adjustment is applied. If the adjustment is a percentage, the Adjustment applies To value specifies the reference value against which the percentage is calculated. The supported values are List Price, Previous, and Prior Price Point.</p> <table border="1" data-bbox="676 546 1426 1323"> <thead> <tr> <th data-bbox="676 546 943 633">Value</th> <th data-bbox="943 546 1426 633">Description</th> </tr> </thead> <tbody> <tr> <td data-bbox="676 633 943 920">Price Point Name</td> <td data-bbox="943 633 1426 920">The adjustment is a percentage of a designated price point, such as List Price, Base Price, or any other Custom Price Point preceding the adjustment in the waterfall sequence.</td> </tr> <tr> <td data-bbox="676 920 943 1122">Previous</td> <td data-bbox="943 920 1426 1122">The adjustment is a percentage of the running total up to the previous adjustment or price point, relative to the current adjustment.</td> </tr> <tr> <td data-bbox="676 1122 943 1323">Prior Price Point</td> <td data-bbox="943 1122 1426 1323">The adjustment represents a percentage of the price point just before the target in the waterfall sequence.</td> </tr> </tbody> </table>	Value	Description	Price Point Name	The adjustment is a percentage of a designated price point, such as List Price, Base Price, or any other Custom Price Point preceding the adjustment in the waterfall sequence.	Previous	The adjustment is a percentage of the running total up to the previous adjustment or price point, relative to the current adjustment.	Prior Price Point	The adjustment represents a percentage of the price point just before the target in the waterfall sequence.
Value	Description								
Price Point Name	The adjustment is a percentage of a designated price point, such as List Price, Base Price, or any other Custom Price Point preceding the adjustment in the waterfall sequence.								
Previous	The adjustment is a percentage of the running total up to the previous adjustment or price point, relative to the current adjustment.								
Prior Price Point	The adjustment represents a percentage of the price point just before the target in the waterfall sequence.								

Field	Setting										
Allowable Actions	Adjust the value. In the example provided, Green signifies allowance and Red indicates restriction:										
	<table border="1"> <thead> <tr> <th>Value</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Adjustment Upwards</td> <td>Users are permitted to increase the value but are restricted from reducing it.</td> </tr> <tr> <td>Adjustment Downwards</td> <td>Users can decrease the value but are prohibited from increasing it.</td> </tr> <tr> <td>No Adjustments</td> <td>Users are not permitted to modify the adjustment.</td> </tr> <tr> <td>Unrestricted</td> <td>Users can increase and decrease the value freely.</td> </tr> </tbody> </table>	Value	Description	Adjustment Upwards	Users are permitted to increase the value but are restricted from reducing it.	Adjustment Downwards	Users can decrease the value but are prohibited from increasing it.	No Adjustments	Users are not permitted to modify the adjustment.	Unrestricted	Users can increase and decrease the value freely.
	Value	Description									
	Adjustment Upwards	Users are permitted to increase the value but are restricted from reducing it.									
	Adjustment Downwards	Users can decrease the value but are prohibited from increasing it.									
No Adjustments	Users are not permitted to modify the adjustment.										
Unrestricted	Users can increase and decrease the value freely.										
Rule Type	Select a rule type. Supported values are: <ul style="list-style-type: none"> • Dimension • Condition 										

5. Under Dimensions:

The Dimensions section is applicable for Dimension rule type.



 You can enter up to six dimensions, which bring in attributes from the line items or headers of any data type. For example, you can select a dimension on quantity.

- a. Click **Add Dimensions**.
- b. In the **Dimension** field, search and select a dimension.
- c. In the **Dimension Value** field, select an option. Supported values are:
 - Discrete
 - Range
 - Weighted Range
 - Cumulative Range - Line Item
 - Cumulative Range


6. Click **Save**.

Creating Price Waterfall Ruleset Entry

Condition

1. Go to ADMIN SETUP > Pricing Administration > Price Waterfall Rulesets. The Price Waterfall Rulesets page is displayed.
2. Click the required price waterfall ruleset name link to open the Price Waterfall Rulesets details page.
3. Click the Waterfall Rules tab.
 - If there are existing metrics, click the required price waterfall rule name link to open the price waterfall rule details page.
 - If there are no metrics created, create a price waterfall rule. For more information, see [Creating a Price Waterfall Rule](#).
4. On the Entries tab, click **Add**. A price waterfall rule entry is added.
5. Click **Add Condition**. The Charge Type Criteria pop-up is displayed.
 - a. On the Line Items tab, enter the following details:
 - i. **Field**: Select a field on the product. You can select custom fields also.
 - ii. **Operator**: Select an operator.
 - iii. **Value**: Enter a value.
 - iv. Click **Add Criteria** to add one more criteria.
 - v. Click the remove icon  to remove a criteria.
 - vi. Click **Remove All** to remove all criteria.
 - vii. Turn the **Logic** button on and enter a value in the **Logic** field when you add multiple criteria.
 - viii. Click **Save**. A criteria is added under the Condition column.
 - b. On the Product Attributes tab, enter the following details:
 - i. **Field**: Select a field on the product. You can select custom fields also.
 - ii. **Operator**: Select an operator.
 - iii. **Value**: Enter a value.
 - iv. Click **Add Criteria** to add one more criteria.
 - v. Click the remove icon  to remove a criteria.
 - vi. Click **Remove All** to remove all criteria.
 - vii. Turn the **Logic** button on and enter a value in the **Logic** field when you add multiple criteria.
 - viii. Click **Save**. A criteria is added under the Condition column.
6. Enter the following details:

Field	Description
Adjustment Amount	Enter a percentage or a number to adjust the price waterfall.
Adjustment Type	Select the kind of adjustment required if the criteria is met. For example, an override to a list price, markup, or discount.
Adjustment Source	You can add dynamic adjustment amounts to waterfall rule entries, using the formula builder to define expressions for both static values and formula fields.


7. Turn the setting **Copy the current data in new row** on to copy the details of a price waterfall rule entry to the next entry.
8. In the **Number of rows** field, enter a value of how many rows you want to add.
9. Click the ellipsis icon  for the entry and click **Delete**.
10. Click **Save**.

Dimension

1. Go to ADMIN SETUP > Pricing Administration > Price Waterfall Rulesets. The Price Waterfall Rulesets page is displayed.
2. Click the required price waterfall ruleset name link to open the Price Waterfall Rulesets details page.
3. Click the Price Waterfall Rules tab.
 - If there are existing metrics, click the required price waterfall rule name link to open the price waterfall rule details page.
 - If there are no metrics created, create a price waterfall rule. For more information, see Creating a Price Waterfall Rule.
4. On the Entries tab, click **Add**. A price waterfall rule entry is added.
5. Enter the following details:

Field	Description
<dimension>	Enter a value for the dimension. The number of dimensions depends on how many dimensions you have configured for the price waterfall rule.
Adjustment Amount	Enter a percentage or a number to adjust the price waterfall.




Field	Description
Adjustment Type	Select the kind of adjustment required if the criteria is met. For example, an override to a list price, markup, or discount.
Adjustment Amount Source	You can add dynamic adjustment amounts to waterfall rule entries, using the formula builder to define expressions for both static values and formula fields.

6. Turn the setting **Copy the current data in new row** on to copy the details of a price waterfall rule entry to the next entry.
7. In the **Number of rows** field, enter a value of how many rows you want to add.
8. Click the ellipsis icon () for the entry and click **Delete**.
 - a. If there are no unsaved changes, the Delete Price Waterfall Rule Entry pop-up is displayed. Click **Confirm**.
 - b. If there are unsaved changes, the a pop-up is displayed prompting your confirmation. Click Discard Changes. The Delete Price Waterfall Rule Entry pop-up is displayed. Click **Confirm**.
9. Click **Save**.

Deleting a Price Waterfall Ruleset

You can delete price waterfall ruleset that are no longer required for your business requirements.




To delete a rollup

1. Go to **ADMIN SETUP > Pricing Administration > Price Waterfall Ruleset**. The Price Waterfall Ruleset page is displayed.
2. Search for the waterfall ruleset and do one of the following:
 - To delete a single ruleset, click the ellipsis icon () next to the rollup name, and click **Delete**.
 - To delete multiple rulesets, click the checkboxes next to the name column, and click the () icon.
 - To delete all the rulesets, click the checkbox in the header row next to the name column, and click the () icon.
3. Click **Confirm**.

Deleting the Price Waterfall

You can delete price waterfall that are no longer required for your business requirements.

To delete a rollup

1. Go to **ADMIN SETUP > Product Administration > Price Waterfall**. The Price Waterfall page is displayed.
2. Search for the price waterfall and do one of the following:
 - To delete a single price waterfall, click the ellipsis icon () next to the rollup name, and click **Delete**.
 - To delete multiple price waterfalls, click the checkboxes next to the name column, and click the () icon.
 - To delete all the price waterfalls, click the checkbox in the header row next to the name column, and click the () icon.
3. Click **Confirm**.

Diagnostics

The diagnostics page provides a comprehensive view of the application regarding system health and status, access alerts or notifications to provide extensive support to the Conga Platform users.

This section provides information on system diagnostic settings.

- [Scheduled Jobs](#)
- [Publisher](#)

Scheduled Jobs

This section provides information on config scheduled jobs and publisher settings.

- [Publisher](#)

Publisher

The publisher page provides a comprehensive listing of Pending, Completed, Failed, and ongoing Config Publishing Jobs and lets you search for required jobs.

Scheduled Jobs Search

You can narrow down the scheduled jobs list using the search feature. You can use a search option to search for a range of scheduled jobs.

Basic Search

In basic search, you can search for scheduled jobs using keywords. For example, you can search using the product name of the scheduled job.

1. In the **Search this list** field, enter a keyword related to your product details such as the scheduled job name.
2. Click the search icon (🔍) or press Enter. CPQ returns all scheduled jobs that contain that keyword in the names of the scheduled jobs.

Sorting Scheduled Jobs

You can sort the Config Publishing Jobs list by clicking the column names. The scheduled jobs are sorted alphabetically in ascending order using the scheduled job name. Every time you click the column name, the sorting switches between ascending and descending order. You can adjust the column width by dragging the columns. Hover near the column boundaries till a two-way arrow appears. Click when the arrow appears and drag left or right to adjust the column width.

Actions available on this page

- **Enable Publisher:** Enables publishing for multiple products at once.

Items per page

At the bottom of the page, you can see the total count of scheduled jobs available. You can control the number of scheduled jobs to be displayed on each page. You can select the number of scheduled jobs from a predefined list. You cannot configure this list. By default, you see 20 records on each page.

By default, you can sort 10, 20, 30, 50, and 100 scheduled jobs per page using the **Rows per page** drop-down. This feature works in association with the search and filter functions to display search records per page. You can use the < and > buttons to move to the next or the previous pages. You can also jump to a certain page using the page search component.

Scheduled Job Summary

- Click the required scheduled job name from the list of scheduled jobs to view details of a product. For more information, see [Configuring the Products](#).

Customizing CPQ on Conga Platform using Callback Classes

Callbacks offer a mechanism to incorporate custom logic into different components of CPQ, such as line items, cart pages, and catalog pages, during runtime. For instance, you can apply custom pricing or validation to line items within the cart using Pricing Callback Classes and Validation Callback Classes respectively. Implementing callbacks involves utilizing interfaces tailored to each specific callback. It's essential to implement these interfaces in C# and configure your custom logic within the corresponding class using the interface's methods. Subsequently, after implementing the interface, you need to register the C# class on the platform to enable invocation of the callback class during runtime.

Setting Up Callbacks using Custom Code on Platform Extensibility and Platform UI

To create a new custom code on Conga Platform, you must complete bit bucket setup for custom code. For more information, see [Getting Started with Custom Code](#).

Authoring and registering callbacks is now supported through the Platform admin interface. You can access and manage custom code through the Platform UI. For step-by-step instructions on creating and using custom code and callbacks, see [Managing Custom Code](#).

In this section, the following Callbacks are described:

- [Validation Callback Class](#)
- [Config Callback Class](#)
- [Product Filter Callback Class](#)
- [Pricing Callback Class](#)
- [Revalidation Callback Class](#)
- [Display Action Callback Class](#)
- [Cart Lifecycle Callback Class](#)
- [Asset Filter Callback Class](#)

Validation Callback Class

Validation Callback provides a mechanism to implement custom validations on the line items in the cart. Validations are any constraints you define on the line item to restrict the selection of that line item based on any condition or criteria. When you define validations, CPQ checks if the condition or the criteria is satisfied and displays an error message accordingly. For example, you can validate if the **Quantity** field for any product is negative and prevent the sales rep from finalizing the cart.

Validation Callback applies validation on the following aspects in the configuration:

- Entire cart
- Line items in the cart
- Price Ramps

To use the Validation Callback you must create a custom C# that implements the *IValidationCallback* interface and register the custom C# with Validation Callback Class. You must write your custom logic in the custom C# language.

The following methods are available in the *IValidationCallback* interface:

Method	Signature	Description
BeforePricingValidationAsync	BeforePricingValidationAsync(IActionRequest request)	This extension point is utilized for creating pre-price validation callbacks.
FinalizeValidationAsync	FinalizeValidationAsync(IActionRequest request)	This hook point is used to write validation callback code for finalize event.
OnCartValidationAsync	OnCartValidationAsync(IActionRequest actionRequest)	This is generic method for validation callback.

The following is an example of the custom logic you can implement using Validation example.

Example

The given code example implements the method of *IValidationCallback* interface.

```
using Conga.Revenue.Common.Callback.Messages;
```

```

using System;
using System.Collections.Generic;
using System.Linq;
using System.Text;
using System.Threading.Tasks;

namespace Conga.Revenue.Common.Callback
{
    public interface IValidationCallback
    {
        /// <summary>
        /// This extension point is used to write prepricing validation callback
        /// </summary>
        /// <param name="actionRequest">This will have cart context where lines are
there.</param>
        public Task BeforePricingValidationAsync(IActionRequest actionRequest);

        /// <summary>
        /// This hookpoint is used to write validation callback code for finalize
event
        /// </summary>
        /// <param name="actionRequest"></param>
        /// <returns></returns>
        public Task FinalizeValidationAsync(IActionRequest actionRequest);

        /// <summary>
        /// This is generic method for validation callback
        /// </summary>
        /// <param name="actionRequest"></param>
        /// <returns></returns>
        public Task OnCartValidationAsync(IActionRequest actionRequest);
    }
}

```

Config Callback Class

Config Callback Class boosts product recommendations beyond the constraints defined by recommendation type rules. When config callback class is executed based on the custom code, you can see a refined list of recommended products in the Recommendation Thumbs up icon. Recommended products will be displayed if the Show Recommended Products Cart View setting is enabled in Config Select Products Settings.

This feature is part of ConfigCallback which implements the *IConfigCallback* interface. This interface facilitates customization and extension of the configuration rules execution process.

The following method is available in the *IConfigCallback* interface and custom logic should be written inside this method:

Method	Signature	Description
BeforeConfigRulesExecutionAsync	BeforeConfigRulesExecutionAsync(IConfigCartRequest configCartRequest)	This extension point is called before config rules execution.
AfterConfigRulesExecutionAsync	AfterConfigRulesExecutionAsync(IConfigCartRequest configCartRequest)	This extension point is called after config rules execution.

Example

The given code example implements the method of *IConfigCallback* interface.

```

1  using Conga.Revenue.Common.Callback.Messages;
2  using System.Threading.Tasks;
3
4
5  namespace Conga.Revenue.Common.Callback
6  {
7      /// <summary>
8      /// IConfigCallback
9      /// </summary>
10     public interface IConfigCallback
11     {
12         /// <summary>
13         /// This extension point is called before config rules execution
14         /// </summary>
15         /// <param name="configCartRequest">Cart and all line item of
16         cart</param>
17         public Task BeforeConfigRulesExecutionAsync(IConfigCartRequest
18         configCartRequest);
19
20         /// <summary>
21         /// This extension point is called after config rules execution
22         /// </summary>

```

```

21         /// <param name="configCartRequest">Cart and all line item of
    cart</param>
22         public Task AfterConfigRulesExecutionAsync(IConfigCartRequest
    configCartRequest);
23     }
24 }

```

Action Callback

 Action Callback can be achieved with *Config Callback* using its method.

Action Callback provides you a mechanism to apply custom actions on different actions available on the cart. For example, you can apply custom action before deleting or copying a bundle, finalizing a cart, submitting a cart for approval. You can directly use methods of the callback to apply the custom action or use Web Services to implement the callback.

Example:

Base product Name: "Cisco UCS"

When the base product is cloned 3 times, the name of the cloned product can be "Cisco UCS-1", "Cisco UCS-2", "Cisco UCS-3" etc...

Expose two interface methods, "before clone" and "after clone," for implementing as callbacks.

To use the Action Callback you must create a custom C# class that implements one of the following interfaces and you must register the custom class with Action Callback Class. You must write your custom logic in the custom C# class.

The following method is available in the *IConfigCallback* interface:

Method	Signature	Description
BeforeConfigRulesExecutionAsync	BeforeConfigRulesExecutionAsync(IConfigCartRequest configCartRequest)	This extension point is called before config rules execution.

Product Filter Callback Class

Product Filter Callback

Product Filter Callback provides you a mechanism to control the visibility of products on the catalog page based on custom criteria that you define.

To use the Product Attribute Callback you must create a custom code that implements the *IProductFilterCallback* interface and register the custom code. You must write your custom logic in the C# custom code.

Feature Flag: `is-productfiltercallback-enabled` is the feature flag that enables the Product Filter callback.

The following methods are available in *IProductFilterCallback* interface:

Method	Signature	Description
GetProductFilterExpr()	GetProductFilterExpr(string cartId);	Callback to return Products Search Filter Expression & search the products which matches the criteria from catalog page. (Parameter name cartId).
GetOptionFilterExpr()	GetOptionFilterExpr(string cartId)	Callback to return Option Search Filter Expression & search the products which matches the criteria from catalog page.
getExcludedOptionIds())	List <i>getExcludedOptionIds(Apttus_Config2.CustomClass.ActionParams)</i>	Callback to return option IDs which are to be excluded from the bundle.

Sample Code

```

1  using Conga.Revenue.Common.Callback.Models;
2  using Conga.Revenue.Common.Callback.Models.SearchFilter;
3  using System.Collections.Generic;
4  using System.Threading.Tasks;
5
6  namespace Conga.Revenue.Common.Callback
7  {
8      /// <summary>
9      /// This interface defines extension points for Product Filter
10     Callback
11     /// </summary>
12     public interface IProductFilterCallback
13     {
14         /// <summary>
15         /// Callback to return Product Search Filter Expression
16         /// </summary>
17         /// <param name="cartId"></param>
18         /// <returns></returns>
19         Task<ICriteria> GetProductFilterExpr(string cartId);
20
21         /// <summary>
22         /// Callback to return Option Search Filter Expression
23         /// </summary>
24         /// <param name="cartId"></param>
25         /// <returns></returns>
26         Task<ICriteria> GetOptionFilterExpr(string cartId);
27
28         /// <summary>
29         /// Callback to return option IDs which are to be excluded from
30         the bundle
31         /// This filter is used when we configure a bundle.
32         /// </summary>
33         /// <param name="config"></param>
34         /// <returns></returns>
35         Task<List<string>> GetExcludedOptionIds(IConfigModel config);
36     }
37 }

```

Example

This is just a sample callback custom class to control the visibility of products on the Catalog page.

The following only filter the Catalog products having ExpirationDate greater than "2092-01-01", second method is used to exclude the list of productid mentioned within the list. You may change the custom class to fit your business requirements.

```
1  public class ProductFilterCallbackTest : CodeExtensibility,
   IPProductFilterCallback
2
3      {
4
5          public async Task<ICriteria> GetProductFilterExpr(string cartId)
6
7          {
8
9              ICriteria criteria = new TestCriteria()
10
11             {
12
13                 ObjectName = "Product",
14
15                 Filter = new TestFilter()
16
17                 {
18
19                     Predicates = new List<IPredicate>()
20
21                     {
22
23                         new TestPredicate()
24
25                         {
26
27                             RowNum = 1,
28
29                             fieldName = "ExpirationDate",
30
31                             FieldLabel = "ExpirationDate",
32
33                             FieldValue = "2092-01-01",
34
35                             FieldType = "DATETIME",
36
37                             CompOper = "greater than",
```




```
38
39         BoolOper = "AND"
40
41     }
42
43
44
45     },
46
47     HasRHSFields = false,
48
49     CondExpr = "1"
50
51 },
52
53     Fields = new List<string>() { "Id" },
54
55     ExprStr = "ExpirationDate > 2092-01-01"
56
57 };
58
59     return criteria;
60
61 }
62
63     public async Task<List<string>> GetExcludedProductIds(string
cartId)
64
65     {
66
67         return new List<string>{
68
69             "{productId01}",
70
71             "{productId02}"
72         }
73
74         //We are excluding {productId01} and {productId02}
75     }
```

Option Filter Callback

i Option filter callback is now clubbed with product filter callback.

Option Filter Callback provides you with a mechanism to control the visibility of the option products on the Configuration page based on the custom logic that you define. The callback is executed in the following scenarios:

- when you click **Configure** on the Catalog page
- when the configuration of the product is pending and you click the wrench icon () on the Cart page.

When callback is invoked, CPQ excludes the option products on the Configuration page.

i Default options and options included based on constraint rules are also hidden when the Option Filter Callback is used to hide options. In the scenario, where all the case all the options in an option group are hidden, the option group is also hidden on the Configuration page.

Example

This is just a sample callback custom class to control the exclusion of option products on the catalog page. The following custom code only removes a few option products. You may change the custom class to list out the ID of option products to fit your business requirements.

```

1  global with sharing class SampleOptionFilterCallback implements
    Apttus_Config2.CustomClass.IOptionFilterCallback {
2
3      /**
4       * Callback to return option IDs which are to be excluded from the
    bundle
5       * This filter is used when we configure a bundle.
6       * @param params is the CustomClass.ActionParams that contains
    bundleId and productIds
7       * @return List of option product IDs which will be excluded
8       */
9       global List<ID>
    getExcludedOptionIds(Apttus_Config2.CustomClass.ActionParams params) {

```

```

10         //return new List<ID>{ <18 CHARACTER PRODUCT ID> };
11         //Example for returning THREE products to be excluded:
12         return new List<ID>{ '01t3C000000DVwh', '01t3C000000DVwm', '01t
3C000000DVvw' };
13         //Example for returning ONE product to be excluded:
14         // return new List<ID>{ 01t50000004nmL1YYX' };
15     }
16 }


```

Pricing Callback Class

The Pricing Callback class enables you to add pricing logic to your cart that cannot be achieved by out-of-the-box pricing mechanisms, such as Price Rulesets and Price Matrices. The Pricing Callback is executed for each bundled product or standalone in the cart. A separate transaction call is initiated for each product in the cart. The Pricing Callback is invoked when you are on the cart page. The pricing callback is invoked during pricing stages and executes the various methods in the BASEPRICE and ADJUSTMENT modes. This feature enables dynamic pricing adjustments based on specific conditions.

IBasePricing Callback

IBasePricing callback is invoked during different pricing stages and executes the various methods in the BASEPRICE and ADJUSTMENT modes.

 Adjustment Line Item Callback can be achieved with IBasePricing callback using its method.

To use the Pricing Callback you must create a custom C# class that implements the following interfaces:

Interface	Description
<i>IBasePricing</i>	Provides a mechanism to define custom logic to be executed during different pricing stages.

Feature Flag

is-pricing-callback-enabled is the feature flag that enables the Product Filter callback.

The following methods are available in the IBasePricing callback interface:

Method	Signature	Description
BeforePricingBatchAsync()	Task BeforePricingBatchAsync(IBatchPriceRequest batchPriceRequest)	You can use this method to define custom logic that must be executed before Base Price is calculated.
OnPricingBatchAsync()	Task OnPricingBatchAsync(IBatchPriceRequest batchPriceRequest)	You can use this method to define custom logic that must be executed during the Base Price calculation. You can use the price list items to write the custom logic.
AfterPricingBatchAsync()	Task <i>AfterPricingBatchAsync(IBatchPriceRequest batchPriceRequest)</i>	You can use this method to define custom logic that must be executed after the Base Price is calculated.
OnProductOptionPriceAsync()	Task OnProductOptionPriceAsync(IBatchPriceRequest batchPriceRequest, IDictionary<string, IProductOptionPrice> productOptionPrice)	You can use this extension point to modify product option prices for the given line item.
OnPriceMatrixAsync()	Task OnPriceMatrixAsync(IBatchPriceRequest batchPriceRequest, IDictionary<string, IEnumerable<IPriceMatrixEntry>> priceMatrixEntries)	You can use this extension point to modify resolved price matrix for the given line item if required.
OnPriceRuleAsync()	Task OnPriceRuleAsync(IBatchPriceRequest batchPriceRequest, IDictionary<string, IEnumerable<IPriceRuleEntry>> priceRuleEntries)	You can use this extension point to modify the resolved price rule entries for the given line item if required.

OnPipelinePriceRuleAsync()	Task OnPipelinePriceRuleAsync(IBatchPriceRequest batchPriceRequest, IDictionary<string, IEnumerable<IPriceRuleEntry>> pipelinePriceRuleEntries)	You can use this extension point to modify the resolved price pipeline rule entries for the given line item if required
OnPriceEscalatorAsync()	Task OnPriceEscalatorAsync(IBatchPriceRequest batchPriceRequest, List<IPriceEscalator> priceEscalators)	You can use this extension point to modify the resolved price escalators if required.

Sample Code

This is just a sample Callback custom class to update the Quantity and Custom Dimension field of product based on the Price Type of Line Item.

```
using System;
using System.Linq;
using Conga.Revenue.Common.Callback.Models;
using Conga.Platform.Extensibility.CustomCode.Library;
using System.Collections.Generic;
using System.Threading.Tasks;
using Conga.Revenue.Common.Callback;
using Conga.Revenue.Common.Callback.Entities;
using Conga.Revenue.Common.Callback.Messages;

namespace APTestan
{
    /// <summary>
    /// Pricing Callback
    /// </summary>
    public class PricingBasePriceCallback : CodeExtensibility,
    IPricingBasePriceCallback
    {
        public async Task AfterPricingBatchAsync(IBatchPriceRequest
batchPriceRequest)
        {
            await Task.CompletedTask;
        }
    }
}
```

```

    public async Task BeforePricingBatchAsync(IBatchPriceRequest
batchPriceRequest)
    {
        var batchLineItems = batchPriceRequest.GetLineItems().SelectMany(x =>
x.GetChargeLines()).ToList();

        foreach(var item in batchLineItems)
        {

            IPriceListItemModel priceListItemModel = item.GetPriceListItem();
            IPriceListItem priceListItemEntity = priceListItemModel.GetEntity();
            var entity = item.GetEntity();

            if(priceListItemEntity.PriceType == "One Time"){
                entity.Quantity = 15;
                entity.SetValue("Auto_Integer_Dimension2_c", 50);
            }else{
                entity.Quantity = 10;
                entity.SetValue("Auto_Integer_Dimension2_c", 25);
            }
        }

        await Task.CompletedTask;
    }

    public async Task OnPricingBatchAsync(IBatchPriceRequest batchPriceRequest)
    {

        var batchLineItems = batchPriceRequest.GetLineItems().SelectMany(x =>
x.GetChargeLines()).ToList();

        await Task.CompletedTask;
    }

    public async Task OnProductOptionPriceAsync(IBatchPriceRequest
batchPriceRequest, IDictionary<string, IProductOptionPrice> productOptionPrice)
    {
        var batchLineItems = batchPriceRequest.GetLineItems().SelectMany(x =>
x.GetChargeLines()).ToList();

```

```

        await Task.CompletedTask;
    }

    public async Task OnPriceMatrixAsync(IBatchPriceRequest batchPriceRequest,
IDictionary<string, IEnumerable<IPriceMatrixEntry>> priceMatrixEntries)
    {
        await Task.CompletedTask;
    }

    public async Task OnPriceRuleAsync(IBatchPriceRequest batchPriceRequest,
IDictionary<string, IEnumerable<IPriceRuleEntry>> priceRuleEntries)
    {
        await Task.CompletedTask;
    }

    public async Task OnPipelinePriceRuleAsync(IBatchPriceRequest
batchPriceRequest, IDictionary<string, IEnumerable<IPriceRuleEntry>>
pipelinePriceRuleEntries)
    {
        await Task.CompletedTask;
    }

    public async Task OnPriceEscalatorAsync(IBatchPriceRequest batchPriceRequest,
List<IPriceEscalator> priceEscalators)
    {
        await Task.CompletedTask;
    }
}
}
}

```

ITotallingPricing Callback

ITotallingPricing Callback class enables you to add pricing totaling logic to your cart that cannot be achieved by out-of-the-box pricing mechanisms. The Pricing Totaling Callback is invoked when you are on the cart page. The pricing totaling callback is invoked during different pricing totaling stages and executes the various methods in the BASEPRICE and ADJUSTMENT modes. This feature enables dynamic pricing adjustments based on specific conditions.

 Adjustment Spread Callback can be achieved with ITotallingPricing Callback using its method.

Example:

Customer has a use case where they want to capture Total QTY (sum of QTY of all Similar Products in cart) against the Line Item. Also, they wanted to Capture Total Product Group QTY (Sum of QTY belonging to Similar Product Group). This intern was used to drive Pricing using Price Rules. In this case `ITotalingPricing` triggers to calculate Total QTY and Total Product Group QTY.

Interface		Description
<i>ITotalingPricing</i>		Provides a mechanism to define custom logic to be executed before, during, and after adjustment Calculation
Method	Signature	Description
BeforePricingCart AdjustmentAsync	Task BeforePricingBatchAsync(IBatchPriceRequest batchPriceRequest)	You can use this method to define custom logic that must be executed before Base Price is calculated.
AfterPricingCartAdjustmentAsync	Task <i>AfterPricingBatchAsync(IBatchPriceRequest batchPriceRequest)</i>	You can use this method to define custom logic that must be executed after the Base Price is calculated.
OnCartPricingCompleteAsync	Task OnProductOptionPriceAsync(IBatchPriceRequest batchPriceRequest, IDictionary<string, IProductOptionPrice> productOptionPrice)	You can use this extension point to modify product option prices for the given line item.

Sample Code

```
using System;
using System.Linq;
using Conga.Revenue.Common.Callback.Models;
using Conga.Platform.Extensibility.CustomCode.Library;
using System.Collections.Generic;
using System.Threading.Tasks;
using Conga.Revenue.Common.Callback;
using Conga.Revenue.Common.Callback.Entities;
using Conga.Revenue.Common.Callback.Messages;
```



```

namespace APTestan
{
    public class PricingTotallingCallback : CodeExtensibility,
    IPricingTotallingCallback
    {
        public async Task BeforePricingCartAdjustmentAsync(IAggregateCartRequest
    aggregateCartRequest)
        {
            var batchLineItems =
    aggregateCartRequest.GetCartContext().GetLineItems().SelectMany(x =>
    x.GetChargeLines()).ToList();

            foreach(var item in batchLineItems){
                var entity = item.GetEntity();
                var cartName = entity.GetLookupValue<string>("Configuration.Name");
                if(cartName == "Auto_Pricing_TotallingCallbackAdjustment"){
                    entity.AdjustmentType = "Discount Amount";
                    entity.AdjustmentAmount = 10;
                }
            }

            await Task.CompletedTask;
        }
        public async Task AfterPricingCartAdjustmentAsync(IAggregateCartRequest
    aggregateCartRequest)
        {
            var batchLineItems =
    aggregateCartRequest.GetCartContext().GetLineItems().SelectMany(x =>
    x.GetChargeLines()).ToList();

            foreach(var item in batchLineItems){
                var entity = item.GetEntity();
                var cartName = entity.GetLookupValue<string>("Configuration.Name");
                if(cartName == "Auto_Pricing_TotallingCallbackAdjustment"){

                    if(entity.AdjustmentAmount > 0){
                        var unitAdjustment = entity.AdjustmentAmount /
    entity.Quantity;
                        entity.SetValue("Auto_Integer_Dimension1_c", unitAdjustment);
                    }else{
                        var unitAdjustment = (entity.AdjustedPrice / entity.Quantity)
    - entity.BasePrice;
                        entity.SetValue("Auto_Integer_Dimension1_c", unitAdjustment);
                    }
                }
            }
        }
    }
}

```


If you have defined Pricing Callback class, Related Pricing Callback is always invoked after the Pricing Callback is executed.

Interface	Description
<i>IRelatedPricing</i>	Provides a mechanism to define custom logic for calculating the pricing for related product line items

The following methods are available in the *Apttus_Config2.CustomClass.IRelatedPricingCallback* interface:

Method	Signature	Description
computeBasePrice()	<i>Apttus_Config2.CustomClass.RelatedPriceResult</i> <i>computeBasePrice(Apttus_Config2.ProductConfiguration, Apttus_Config2.LineItem, List)</i>	You can use this method to apply custom logic for related pricing calculation and override the default CPQ related pricing logic.

Example

In the following sample code, Related Pricing Callback to calculates the price on related line items.

```
using System;
using System.Linq;
using Conga.Revenue.Common.Callback.Models;
using Conga.Platform.Extensibility.CustomCode.Library;
using System.Collections.Generic;
using System.Threading.Tasks;
using Conga.Revenue.Common.Callback;
using Conga.Revenue.Common.Callback.Entities;
using Conga.Revenue.Common.Callback.Messages;

namespace DemoRelatedPricingCallback
{
    public class RelatedPricingCallback : CodeExtensibility, IRelatedPricingCallback
    {
        public async Task<List<IRelatedPricingBatchResponse>>
        ComputeBasePriceBatchAsync(IRelatedPricingBatchRequest relatedPricingBatchRequest)
        {
```

```

        List<IRelatedPricingBatchResponse> relatedPricingBatchResponseResult =
new List<IRelatedPricingBatchResponse>();
        List<ILineItemModel> relatedLineItems =
relatedPricingBatchRequest.GetRelatedLineItems();

        foreach(var relatedLineItem in relatedLineItems) {
            var cartName =
relatedLineItem.GetLookupValue<string>("Configuration.Name");
            if(cartName.Contains("RelatedPriceCallback01")){
                var priceBreakupRecords =
relatedLineItem.GetPriceBreakupRecords();

                IRelatedPricingBatchResponse relatedPricingResponse =
relatedPricingBatchRequest.CreateRelatedPricingBatchResponse(relatedLineItem);
                relatedPricingResponse.BasePrice = 500;
                relatedPricingBatchResponseResult.Add(relatedPricingResponse);
            }
        }
        return await Task.FromResult(relatedPricingBatchResponseResult);
    }
}
}

```

Revalidation Callback Class

Revalidation Callback provides you a mechanism to implement custom revalidations for products based on custom criteria. You can define custom criteria based on which the products are identified by CPQ for revalidation. The callback allows you to define a custom logic to be applied on the line item along with revalidation. You can also define a custom product version when the line item is created.

Example

You can use this callback to a scenario like:

- You can have multiple versions for a single product record. This enables you to revalidate a specific version of the product as necessary. For example, for product record, you can set the version as X, Y, and any such value for the newly created line item of that product. You can determine which line item qualifies for revalidation and apply custom logic on the line items accordingly.
- You can apply validation based custom fields other than the **Product Version**.

- You can validate changes in pricing fields like **List price** of a given price list item.

i You can control Revalidation feature by using config system properties with setting name `EnableRevalidationOnPricing` to `True`.

To use the Revalidation Callback you must create a custom C# that implements the *IRevalidationCallback* interface and register the custom C# with Revalidation Callback Class. You must write your custom logic in the custom C#.

The following methods are available in the *IRevalidationCallback* interface:

Method	Signature	Description
GetRevalidationDetailAsync()	GetRevalidationDetailAsync(IActionRequest revalidationRequest)	You can use this method to determine whether the line item requires revalidation based on a custom logic that you can define. This method is invoked when you reconfigure a save or finalized cart.
GetApplyRevalidationDetailAsync()	GetApplyRevalidationDetailAsync(IActionRequest revalidationRequest)	You can use this method write custom logic to apply on line items. This method is invoked when you click Apply Revalidation on the Revalidation pop-up.

Example

The below-given code example checks if the quantity of line items is greater than 10 then triggers the revalidation on the cart, revalidates the line item and resets the quantity of the line items.

```

1 using Conga.Revenue.Common.Callback.Messages;
2 using System.Threading.Tasks;
3
4 namespace Conga.Revenue.Common.Callback

```

```

5  {
6      /// <summary>
7      /// IRevalidationCallback: Revalidation callback hookpoint
8      /// </summary>
9      public interface IRevalidationCallback
10     {
11         /// <summary>
12         /// This hookpoint is used to write get revalidation callback
13         code.
14         /// </summary>
15         /// <param name="revalidationRequest">revalidationRequest</param>
16         public Task GetRevalidationDetailAsync(IActionRequest
17         revalidationRequest);
18         /// <summary>
19         /// This hookpoint is used to write get apply revalidation
20         callback code.
21         /// </summary>
22         /// <param name="revalidationRequest">revalidationRequest</param>
23         /// <returns></returns>
24         public Task GetApplyRevalidationDetailAsync(IActionRequest
25         revalidationRequest);
26     }
27 }

```

Display Action Callback Class

Display Action Callback provides you a mechanism to disable any of the action buttons on the cart. Following are few examples of custom buttons that you can disable:

- Abandon
- Approvals
- Generate
- Quick Save

To use the Display Action Callback you must create a custom C# class that implements the *IDisplayActionCallback* interface and register the custom C# class with Display Action Callback Class. You must write your custom logic in the custom C# class.

The following method is available in the *IDisplayActionCallback* interface:

Method	Signature	Description
ExecuteDisplayAction	<i>ExecuteDisplayAction(IActionRequest actionRequest)</i>	You can use this method to execute display action.

Example

This is just a sample callback custom class to hide the visibility of the **Abandon** and **Generate** action buttons on the cart page. You may change the custom class to fit your business requirements

```

1  using Conga.Revenue.Common.Callback.Messages;
2  using Conga.Revenue.Common.Callback.Models;
3  using System.Collections.Generic;
4  using System.Threading.Tasks;
5
6  namespace Conga.Revenue.Common.Callback
7  {
8      /// <summary>
9      /// Interface for display action callback
10     /// </summary>
11     public interface IDisplayActionCallback
12     {
13         /// <summary>
14         /// Executes the display action.
15         /// </summary>
16         /// <param name="actionRequest">The action request.</param>
17         /// <returns></returns>
18         Task ExecuteDisplayAction(IActionRequest actionRequest);
19     }
20 }
```

Cart Lifecycle Callback Class

The Cart Lifecycle Callback in CPQ on Platform is utilized during cart creation to populate fields that cannot be written as formula fields. It enables the execution of more complex logic, similar to actions performed in triggers before before the cart is finalized.

To use the Cart Lifecycle Callback you must create a custom C# that implements the *ICartLifecycleCallback* interface and register the custom C# with Cart Lifecycle Callback Class. You must write your custom logic in the custom C#.

The following method is available in the *ICartLifecycleCallback* interface:

Method	Signature	Description
BeforeCartCreationAsync	BeforeCartCreationAsync(IProductConfiguration cart)	You can use this method to enable or disable an action button. User has to mention the desired action button.

Example

```

1  using Conga.Revenue.Common.Callback.Entities;
2  using Conga.Revenue.Common.Callback.Models;
3  using System;
4  using System.Collections.Generic;
5  using System.Linq;
6  using System.Text;
7  using System.Threading.Tasks;
8
9  namespace Conga.Revenue.Common.Callback
10 {
11     /// <summary>
12     /// This interface will be used to update product configuration via
13     /// callback.
14     /// </summary>
15     public interface ICartLifecycleCallback
16     {
17         /// <summary>
18         /// Used to update product configuration
19         /// </summary>
20         /// <param name="cart"></param>
21         /// <returns></returns>
22         public Task BeforeCartCreationAsync(IProductConfiguration cart);
23     }

```

Asset Filter Callback Class

Asset filter callback provides you a mechanism to define the criteria based on which you want to filter assets on the Installed Product page. The asset line items on the Installed product page are shown according to the business logic defined in the asset filter callback

class. You can further filter the asset on the Installed Products page using the filters on the page.

To use the Asset filter callback you must create a custom C# class that implements the *IAssetFilterCallback* interface and register the custom C# class with Asset Filter Callback Class. You must write your custom logic in the custom C# class.

The following methods are available in the *IAssetFilterCallback* interface:

Method	Signature	Description
GetFilterExpression	GetFilterExpression(IAssetFilterCallbackRequest assetFilterCallbackRequest)	Callback to return filter expression which will be used to filter asset line items.
ValidateAssetTermination	ValidateAssetTermination(IAssetTerminateCallbackRequest assetTerminateCallbackRequest)	Callback to validate asset termination.

The following is an example of the custom logic you can implement using asset filter example.

Example

```

1  using Conga.Revenue.Common.Callback.Messages;
2  using System.Threading.Tasks;
3
4  namespace Conga.Revenue.Common.Callback
5  {
6      /// <summary>
7      /// This interface defines extension points for Asset Filter Callback
8      /// </summary>
9      public interface IAssetFilterCallback
10     {
11         /// <summary>
12         /// Callback to return filter expression which will be used to
13         filter asset line items
14         /// </summary>
15         /// <param name="assetFilterCallbackRequest">List of account Ids
16         passed as search parameter</param>
17         /// <returns> filter expression </returns>

```

```
16         Task<string> GetFilterExpression(IAssetFilterCallbackRequest
17         assetFilterCallbackRequest);
18         /// <summary>
19         /// Callback to validate asset termination
20         /// </summary>
21         /// <param name="assetTerminateCallbackRequest"> List of asset
22         ids, account ids and termination date</param>
23         /// <returns>
24         /// Validation message to be shown to the user, If termination
25         date is invalid and termination can't be proceeded
26         /// Empty string, if termination date is valid and termination
27         can be proceeded.
28         /// </returns>
29         Task<string>
30         ValidateAssetTermination(IAssetTerminateCallbackRequest
31         assetTerminateCallbackRequest);
32     }
33 }
```

CPQ for REST API Developers

This section explains the REST APIs provided by Conga Configuration, Pricing, and Quoting (CPQ).

Topic	Description
What's Covered	This section walks API developers through the list of REST APIs provided by Conga.
Primary Audience	API developers
Updates	For a comprehensive list of updates to this section for each release, see the What's New in CPQ Documentation topic.
Other Resources	Refer to <i>Conga CPQ Release Notes</i> for information on new features and enhancements, resolved issues, and known issues for a specific release.

CPQ REST APIs

Navigate to the Conga Developer Portal to review interactive API documentation for CPQ.

Conga CPQ on Conga Platform Use Cases

This section describes Conga CPQ use cases:

- [Use Case: User Authentication to Conga Platform](#)
- [Getting the Application Context](#)
- [Use Case: Browsing the Catalog](#)
- [Retrieving Product Details](#)
- [Interacting with the Cart](#)
- [Creating and Editing Quotes](#)
- [Working with Order APIs](#)

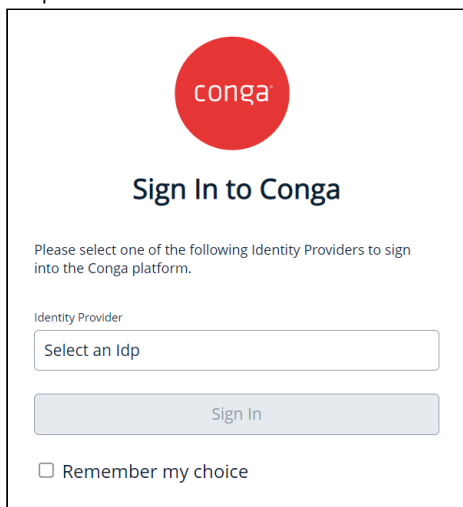
Use Case: User Authentication to Conga Platform

All users and orgs require authorization to access the CPQ services on the Conga Platform. Before starting the authentication process, the org or user must be onboarded to the Conga Platform with the help of Dev Ops or Cloud Ops.

Conga Platform users can use an external identity provider to log in to the application which is implemented through the OAuth 2.0 to enable communication between the application and external identity provider. So, users can log in to the application using their existing credentials from a trusted third-party identity provider, instead of creating new credentials specifically for the application. The application relies on the identity provider for authentication and authorization. This enables a secure and convenient way of accessing the application.

Log in to the Conga Platform:

1. Launch the application using the Conga Platform URL on a supported web browser. This redirects you to the OAuth screen where you can select the Identity Providers as required.



2. Click **Identity Provider** and select the required Idp from the list.
3. Click **Sign In**.
4. Log in with your credentials on the external identity provider. A Conga Platform home page is displayed.

Getting the Application Context

Understanding the settings and configurations helps you to configure products, calculate pricing, and generate quotes quickly.

Getting Storefront

You can retrieve the storefront details.

Method: GET

Endpoint: /storefronts

For example, the following sample code enables you to get the storefront details.

Request

```
'GET' \ 'https://<URL_of_the_Instance>/api/revenue-admin/v1/storefronts'
```

Getting Active Pricelist

You can retrieve the price lists.

Method: GET

Endpoint: /price-lists/active

For example, the following sample code enables you to get the active price lists.

Request

```
'GET' \ 'https://<URL_of_the_Instance>/api/catalog/v1/price-lists/active'
```

Get Application Settings

You can retrieve the custom settings defined for a flow name provided in the parameter. When custom settings are defined at both flow-level and global-level, flow-level take precedence over global settings in response the API retrieves.

The API retrieves the following custom settings:

- Config System Properties
- Config Select Config Products Settings

- Config Select Bundle Options Settings
- Incentive System Properties
- Installed Products Settings

The above-mentioned custom settings are categorized into the following:

- Config Page Settings
- Catalog Page Settings
- Cart Page Settings
- Pricing Engine
- Configuration Engine
- Promotions Settings
- Asset Settings
- Incentives Settings
- Favorite Settings

Method: GET

Endpoint: /flows/{flowName}/settings

For example, the following sample code enables you to get custom settings defined for a flow.

Request

```
'GET' \ 'https://<URL_of_the_Instance>/flows/{flowName}/settings'
```

Get User Details

You can retrieve the user details.

Method: GET

Endpoint: /api/user-management/v1/users

For example, the following sample code enables you to get the user details.

Request

```
'GET' \ 'https://<URL_of_the_Instance>/api/user-management/v1/users'
```

Get Account Details

You can retrieve the account details.

Method: GET

Endpoint: /api/data/v1/objects/{objectName}

For example, the following sample code enables you to get the account details.

Request

```
'GET' \ 'https://<URL_of_the_Instance>/api/data/v1/objects/account'
```

Getting the Active Cart

You can retrieve the latest active cart for a given quote/proposal. Pass the Quote ID in the parameters. If the cart does not exist for the provided quote, this API will create a new cart. In the case of an existing cart, the saved cart ID is returned.

For a newly created cart, the cart status is New and a new Cart ID is generated. The following fields will be passed from the quote header to the newly created cart - Account, Price List, Status, Business Object, Business Object Type, cart Effective Date, Expected Start Date, Expected End Date, Location, Quote/Proposal, Pricing Date, Payment Term, and Cart Name.

Method: GET

Endpoint: /quotes/{quoteId}/carts/active

For example, the following sample code enables you to get the active cart.

Request

```
'GET' \ 'https://<URL_of_the_Instance>/api/cart/v1/quotes/{quoteId}/carts/active'
```

Use Case: Browsing the Catalog

A Catalog is a view that allows hierarchical categorization of products for you to search through products. This use case describes how to browse through a catalog. It helps you explore the products before you add them to the cart. There are multiple ways you can search and find the product you are looking for. Implementation teams can use these APIs

to filter products by their characteristics, sort products by fields associated with them, apply pagination to the results, and use other such functionalities to navigate the catalog.

Getting the Category Tree for a Price List

You can retrieve all or a filtered list of categories based on provided parameters. For example, pass the price list ID to retrieve all categories associated with that price list ID.

Prerequisite

You must have price list ID to retrieve the categories associated with it.

Example

The following table lists the API method, endpoint, and path as well as a sample request and response to get the category tree for a price list.

Method	GET	
Endpoint	/categories	
Request Parameter	The following URL parameters are used to narrow down the search result to specifically retrieve categories associated with a price list ID.	
	Parameters	Values
	page	1
	limit	100
	include	product
	price list ID	ffc5c4ad-7329-472e-aca6-b733c2ae47dd
Request URL	https://<URL_of_the_Instance>/api/catalog/v1/categories?includes=products&page=1&limit=100	

Request Body	<p>The following sample code enables you to get the category tree for the given price list and based on the other above-mentioned parameters.</p> <pre data-bbox="288 365 1426 698">1 curl --request GET \ 2 --url 'https://<URL_of_the_Instance>/api/catalog/v1/ categories?includes=products&page=1&limit=100' \ 3 --header 'PriceListId: ffc5c4ad-7329-472e-aca6- b733c2ae47dd' \ 4 --header 'accept: application/json' \ 5 --header 'authorization: Bearer <token></pre>
---------------------	--

Response	<p>The API returns the list of categories with details such as Category ID, Category Name, Description, Hierarchy ID, and the category's parent and child categories.</p>
	Response Body
	<pre> 1 [2 { 3 "AncestorId": null, 4 "AncestorPath": "391a047e-0a21-4f4a-be76-835ca61515d8", 5 "HierarchyId": "fab05569-02aa-43fc-b44c-d88b0d30d6ac", 6 "DefaultSearchCategory": false, 7 "Description": "Parent_RLPAutoCat_SmokeProd_Category", 8 "ExpandedByDefault": false, 9 "GuidePage": null, 10 "HideAllSearchFilters": false, 11 "ImageUrl": null, 12 "IncludeInTotalsView": true, 13 "IsHidden": false, 14 "IsLeaf": false, 15 "IsPicklist": false, 16 "Label": "Parent_RLPAutoCat_SmokeProd_Category", 17 "LargeImageUrl": null, 18 "LongDescription": null, 19 "SearchFilterFields": null, 20 "Type": null, 21 "CreatedBy": null, 22 "CreatedDate": "2023-01-19T10:01:45.0678137Z", 23 "Id": "391a047e-0a21-4f4a-be76-835ca61515d8", 24 "ModifiedBy": null, 25 "ModifiedDate": "2023-01-19T10:01:45.0678137Z", 26 "Name": "Parent_RLPAutoCat_SmokeProd_Category", 27 "Currency": "USD", 28 "ExternalId": null, 29 "Digest": null, 30 "CatAuto_Boolean_CstField_c": null, 31 "CatAuto_Currency_CstField_c": null, 32 "CatAuto_CustomFieldPickList_c": null, 33 "CatAuto_DateTime_CstField_c": null, 34 "CatAuto_Double_CstField_c": null, 35 "CatAuto_Int_CstField_c": null, 36 "CatAuto_Multipicklist_CstField_c": null, 37 "CatAuto_String_CstField_c": null, </pre>

```

38     "CreatedById": "d717a075-9cbf-480c-b230-837e0e6dee75",
39     "ModifiedById": "d717a075-9cbf-480c-b230-837e0e6dee75"
40 },
41 {
42     "AncestorId": "ed316c6a-0bbb-4477-bb88-baad008e3478",
43     "AncestorPath": "391a047e-0a21-4f4a-
be76-835ca61515d8,ed316c6a-0bbb-4477-bb88-
baad008e3478,7f0d36db-2484-4920-b099-f08adc7111fa",
44     "HierarchyId": "fab05569-02aa-43fc-b44c-d88b0d30d6ac",
45     "DefaultSearchCategory": false,
46     "Description": "Level3_Ch1_RLPAutoCat_SmokeProd_Category",
47     "ExpandedByDefault": false,
48     "GuidePage": null,
49     "HideAllSearchFilters": false,
50     "ImageURL": null,
51     "IncludeInTotalsView": true,
52     "IsHidden": false,
53     "IsLeaf": true,
54     "IsPicklist": false,
55     "Label": "Level3_Ch1_RLPAutoCat_SmokeProd_Category",
56     "LargeImageURL": null,
57     "LongDescription": null,
58     "SearchFilterFields": null,
59     "Type": null,
60     "CreatedBy": null,
61     "CreatedDate": "2023-01-19T10:02:44.7413515Z",
62     "Id": "7f0d36db-2484-4920-b099-f08adc7111fa",
63     "ModifiedBy": null,
64     "ModifiedDate": "2023-01-19T10:02:44.7413515Z",
65     "Name": "Level3_Ch1_RLPAutoCat_SmokeProd_Category",
66     "Currency": "USD",
67     "ExternalId": null,
68     "Digest": null,
69     "CatAuto_Boolean_CstField_c": null,
70     "CatAuto_Currency_CstField_c": null,
71     "CatAuto_CustomFieldPickList_c": null,
72     "CatAuto_DateTime_CstField_c": null,
73     "CatAuto_Double_CstField_c": null,
74     "CatAuto_Int_CstField_c": null,
75     "CatAuto_Multipicklist_CstField_c": null,
76     "CatAuto_String_CstField_c": null,
77     "CreatedById": "d717a075-9cbf-480c-b230-837e0e6dee75",
78     "ModifiedById": "d717a075-9cbf-480c-b230-837e0e6dee75"
79 }

```

	80]
--	----	---

Getting the Products in a Category

You can retrieve all active products associated with the provided category ID and price list ID. This can be the ID of the leaf category, sub-category, or root category.

Prerequisite

You must have a price list ID and the category ID.

Example 1

The following table lists the API method, endpoint, and path as well as a sample request and response to get all products associated with a category and the corresponding price list.

Method	GET										
Endpoint	/categories/{categoryId}/products										
Request URL	<p>The following URL parameters are used to narrow down the search result to specifically retrieve products associated with a category ID and a price list ID.</p> <table border="1" style="width: 100%;"> <thead> <tr> <th>Parameters</th> <th>Values</th> </tr> </thead> <tbody> <tr> <td>page</td> <td>10</td> </tr> <tr> <td>limit</td> <td>5</td> </tr> <tr> <td>category ID</td> <td>391a047e-0a21-4f4a-be76-835ca61515d8</td> </tr> <tr> <td>price list ID</td> <td>ffc5c4ad-7329-472e-aca6-b733c2ae47dd</td> </tr> </tbody> </table>	Parameters	Values	page	10	limit	5	category ID	391a047e-0a21-4f4a-be76-835ca61515d8	price list ID	ffc5c4ad-7329-472e-aca6-b733c2ae47dd
Parameters	Values										
page	10										
limit	5										
category ID	391a047e-0a21-4f4a-be76-835ca61515d8										
price list ID	ffc5c4ad-7329-472e-aca6-b733c2ae47dd										

Request

The following sample code enables you to get the products associated with the given price list and category, adhering to the other above-mentioned parameters.

```
1 curl --request GET \  
2     --url 'https://rlp-dev.congacloud.io/api/  
catalog/v1/categories/cf3e1894-7732-4de2-  
bc2d-171d3bafa563/products?page=10&limit=5' \  
3     --header 'PriceListId: 51432cec-268a-4d2f-  
a543-8b91f70cdb7c' \  
4     --header 'accept: application/json' \  
5     --header 'authorization: Bearer <Token>
```

Response	<p>For a leaf category, the API returns all products associated with it. If the ID of the root or sub-category (not a leaf category ID) is provided, the API returns all the products associated with all child categories.</p>
	<div style="background-color: #f2f2f2; padding: 5px; margin-bottom: 5px;">Response Body</div> <pre style="font-family: monospace; font-size: 0.9em;"> 1 [2 { 3 "ConfigurationType": "Standalone", 4 "Customizable": null, 5 "Description": "ACS_Pagination_St_46", 6 "DisplayUrl": null, 7 "EffectiveDate": "1900-01-01T00:00:00Z", 8 "ExcludeFromSitemap": false, 9 "ExpirationDate": "2100-12-31T00:00:00Z", 10 "Family": null, 11 "HasAttributes": false, 12 "HasDefaults": false, 13 "HasOptions": false, 14 "HasSearchAttributes": false, 15 "ImageURL": "https://i1.wp.com/ techforceservices.com.au/wp-content/uploads/2019/04/ Conga.png?fit=584%2C190,ssl=1", 16 "IsActive": true, 17 "IsCustomizable": false, 18 "IsTabViewEnabled": false, 19 "ProductCode": "ACS_Pagination_St_46", 20 "ProductType": null, 21 "QuantityUnitOfMeasure": null, 22 "RenewalLeadTime": 0, 23 "StockKeepingUnit": null, 24 "Uom": "Each", 25 "Version": 1, 26 "TriggeringPrimaryLineNumbers": null, 27 "RuleActionId": null, 28 "CreatedBy": null, 29 "CreatedDate": "2022-08-11T10:18:59.1461591Z", 30 "Id": "ddc05e30-9406-4713-991e-ea9fb7d199db", 31 "ModifiedBy": null, 32 "ModifiedDate": "2022-09-06T14:22:43Z", 33 "Name": "ACS_Pagination_St_46", 34 "Currency": null, </pre>

```

35     "ExternalId": null,
36     "Digest": null,
37     "CatAuto_Boolean_CstField_c": true,
38     "CatAuto_Currency_CstField_c": null,
39     "CatAuto_CustomFieldPickList_c": "USD",
40     "CatAuto_DateTime_CstField_c":
"2022-03-01T00:00:00Z",
41     "CatAuto_Double_CstField_c": 169,
42     "CatAuto_Int_CstField_c": 369,
43     "CatAuto_Multipicklist_CstField_c": [
44         "Red",
45         "Blue"
46     ],
47     "CatAuto_String_CstField_c": "AutoString_169",
48     "CreatedById": "27634e3f-904a-4321-9ce5-
c2edbe181d90",
49     "ModifiedById": "27634e3f-904a-4321-9ce5-
c2edbe181d90"
50 },
51 {
52     "ConfigurationType": "Standalone",
53     "Customizable": null,
54     "Description": "ACS_Pagination_St_47",
55     "DisplayUrl": null,
56     "EffectiveDate": "1900-01-01T00:00:00Z",
57     "ExcludeFromSitemap": false,
58     "ExpirationDate": "2100-12-31T00:00:00Z",
59     "Family": null,
60     "HasAttributes": false,
61     "HasDefaults": false,
62     "HasOptions": false,
63     "HasSearchAttributes": false,
64     "ImageURL": "https://i1.wp.com/
techforceservices.com.au/wp-content/uploads/2019/04/
Conga.png?fit=584%2C190,ssl=1",
65     "IsActive": true,
66     "IsCustomizable": false,
67     "IsTabViewEnabled": false,
68     "ProductCode": "ACS_Pagination_St_47",
69     "ProductType": null,
70     "QuantityUnitOfMeasure": null,
71     "RenewalLeadTime": 0,
72     "StockKeepingUnit": null,
73     "Uom": "Each",

```

```

74     "Version": 1,
75     "TriggeringPrimaryLineNumbers": null,
76     "RuleActionId": null,
77     "CreatedBy": null,
78     "CreatedDate": "2022-08-11T10:18:59.1461591Z",
79     "Id": "b5f22f5c-8a88-4fc7-add6-b3f11bf0114e",
80     "ModifiedBy": null,
81     "ModifiedDate": "2022-09-06T14:22:43Z",
82     "Name": "ACS_Pagination_St_47",
83     "Currency": null,
84     "ExternalId": null,
85     "Digest": null,
86     "CatAuto_Boolean_CstField_c": false,
87     "CatAuto_Currency_CstField_c": null,
88     "CatAuto_CustomFieldPickList_c": "INR",
89     "CatAuto_DateTime_CstField_c":
90     "2022-03-01T00:00:00Z",
91     "CatAuto_Double_CstField_c": 170,
92     "CatAuto_Int_CstField_c": 370,
93     "CatAuto_Multipicklist_CstField_c": [
94         "Yellow",
95         "Green"
96     ],
97     "CatAuto_String_CstField_c": "AutoString_170",
98     "CreatedById": "27634e3f-904a-4321-9ce5-
c2edbe181d90",
99     "ModifiedById": "27634e3f-904a-4321-9ce5-
c2edbe181d90"
100  },
101  {
102     "ConfigurationType": "Standalone",
103     "Customizable": null,
104     "Description": "ACS_Pagination_St_48",
105     "DisplayUrl": null,
106     "EffectiveDate": "1900-01-01T00:00:00Z",
107     "ExcludeFromSitemap": false,
108     "ExpirationDate": "2100-12-31T00:00:00Z",
109     "Family": null,
110     "HasAttributes": false,
111     "HasDefaults": false,
112     "HasOptions": false,
113     "HasSearchAttributes": false,

```



```

113     "ImageURL": "https://i1.wp.com/
techforceservices.com.au/wp-content/uploads/2019/04/
Conga.png?fit=584%2C190,ssl=1",
114     "IsActive": true,
115     "IsCustomizable": false,
116     "IsTabViewEnabled": false,
117     "ProductCode": "ACS_Pagination_St_48",
118     "ProductType": null,
119     "QuantityUnitOfMeasure": null,
120     "RenewalLeadTime": 0,
121     "StockKeepingUnit": null,
122     "Uom": "Each",
123     "Version": 1,
124     "TriggeringPrimaryLineNumbers": null,
125     "RuleActionId": null,
126     "CreatedBy": null,
127     "CreatedDate": "2022-08-11T10:18:59.1461591Z",
128     "Id": "1387c727-82a9-4a24-bdd6-57b2a379cef2",
129     "ModifiedBy": null,
130     "ModifiedDate": "2022-09-06T14:22:43Z",
131     "Name": "ACS_Pagination_St_48",
132     "Currency": null,
133     "ExternalId": null,
134     "Digest": null,
135     "CatAuto_Boolean_CstField_c": true,
136     "CatAuto_Currency_CstField_c": null,
137     "CatAuto_CustomFieldPickList_c": "GBP",
138     "CatAuto_DateTime_CstField_c":
"2022-03-01T00:00:00Z",
139     "CatAuto_Double_CstField_c": 171,
140     "CatAuto_Int_CstField_c": 371,
141     "CatAuto_Multipicklist_CstField_c": [
142         "Pink",
143         "White"
144     ],
145     "CatAuto_String_CstField_c": "AutoString_171",
146     "CreatedById": "27634e3f-904a-4321-9ce5-
c2edbe181d90",
147     "ModifiedById": "27634e3f-904a-4321-9ce5-
c2edbe181d90"
148     },
149     {
150     "ConfigurationType": "Standalone",
151     "Customizable": null,

```

```

152     "Description": "ACS_Pagination_St_49",
153     "DisplayUrl": null,
154     "EffectiveDate": "1900-01-01T00:00:00Z",
155     "ExcludeFromSitemap": false,
156     "ExpirationDate": "2100-12-31T00:00:00Z",
157     "Family": null,
158     "HasAttributes": false,
159     "HasDefaults": false,
160     "HasOptions": false,
161     "HasSearchAttributes": false,
162     "ImageURL": "https://il.wp.com/
techforceservices.com.au/wp-content/uploads/2019/04/
Conga.png?fit=584%2C190,ssl=1",
163     "IsActive": true,
164     "IsCustomizable": false,
165     "IsTabViewEnabled": false,
166     "ProductCode": "ACS_Pagination_St_49",
167     "ProductType": null,
168     "QuantityUnitOfMeasure": null,
169     "RenewalLeadTime": 0,
170     "StockKeepingUnit": null,
171     "Uom": "Each",
172     "Version": 1,
173     "TriggeringPrimaryLineNumbers": null,
174     "RuleActionId": null,
175     "CreatedBy": null,
176     "CreatedDate": "2022-08-11T10:18:59.1461591Z",
177     "Id": "dda4cb81-d8c9-4b15-9d59-0bf8c60db23d",
178     "ModifiedBy": null,
179     "ModifiedDate": "2022-09-06T14:22:43Z",
180     "Name": "ACS_Pagination_St_49",
181     "Currency": null,
182     "ExternalId": null,
183     "Digest": null,
184     "CatAuto_Boolean_CstField_c": false,
185     "CatAuto_Currency_CstField_c": null,
186     "CatAuto_CustomFieldPickList_c": "EUR",
187     "CatAuto_DateTime_CstField_c":
"2018-03-01T00:00:00Z",
188     "CatAuto_Double_CstField_c": 172,
189     "CatAuto_Int_CstField_c": 372,
190     "CatAuto_Multipicklist_CstField_c": [
191         "Purple",

```

```

192     "Black"
193   ],
194   "CatAuto_String_CstField_c": "AutoString_172",
195   "CreatedById": "27634e3f-904a-4321-9ce5-
c2edbe181d90",
196   "ModifiedById": "27634e3f-904a-4321-9ce5-
c2edbe181d90"
197 },
198 {
199   "ConfigurationType": "Standalone",
200   "Customizable": null,
201   "Description": "ACS_Pagination_St_50",
202   "DisplayUrl": null,
203   "EffectiveDate": "1900-01-01T00:00:00Z",
204   "ExcludeFromSitemap": false,
205   "ExpirationDate": "2100-12-31T00:00:00Z",
206   "Family": null,
207   "HasAttributes": false,
208   "HasDefaults": false,
209   "HasOptions": false,
210   "HasSearchAttributes": false,
211   "ImageURL": "https://i1.wp.com/
techforceservices.com.au/wp-content/uploads/2019/04/
Conga.png?fit=584%2C190,ssl=1",
212   "IsActive": true,
213   "IsCustomizable": false,
214   "IsTabViewEnabled": false,
215   "ProductCode": "ACS_Pagination_St_50",
216   "ProductType": null,
217   "QuantityUnitOfMeasure": null,
218   "RenewalLeadTime": 0,
219   "StockKeepingUnit": null,
220   "Uom": "Each",
221   "Version": 1,
222   "TriggeringPrimaryLineNumbers": null,
223   "RuleActionId": null,
224   "CreatedBy": null,
225   "CreatedDate": "2022-08-11T10:18:59.1461591Z",
226   "Id": "81c9ef97-5b6d-4f17-9f92-d960f7e935b6",
227   "ModifiedBy": null,
228   "ModifiedDate": "2022-09-06T14:22:43Z",
229   "Name": "ACS_Pagination_St_50",
230   "Currency": null,
231   "ExternalId": null,

```

```

232     "Digest": null,
233     "CatAuto_Boolean_CstField_c": true,
234     "CatAuto_Currency_CstField_c": null,
235     "CatAuto_CustomFieldPickList_c": "USD",
236     "CatAuto_DateTime_CstField_c":
237     "2025-03-01T00:00:00Z",
238     "CatAuto_Double_CstField_c": 173,
239     "CatAuto_Int_CstField_c": 373,
240     "CatAuto_Multipicklist_CstField_c": [
241       "Red",
242       "Blue"
243     ],
244     "CatAuto_String_CstField_c": "AutoString_173",
245     "CreatedById": "27634e3f-904a-4321-9ce5-
c2edbe181d90",
246     "ModifiedById": "27634e3f-904a-4321-9ce5-
c2edbe181d90"
247   }
248 ]

```

Example 2

The following table lists the API method, endpoint, and path as well as a sample request and response to get a product having a specific name and are associated with a category and a corresponding price list.

Method	GET
Endpoint	/categories/{categoryId}/products

Request URL	<p>The following URL parameters are used to narrow down the search result to specifically retrieve products with the name "ACS_System_Installer" associated with a category ID and a price list ID.</p> <table border="1" data-bbox="485 378 1426 759"> <thead> <tr> <th>Parameters</th> <th>Values</th> </tr> </thead> <tbody> <tr> <td>filter</td> <td><i>eq(Name:ACS_System_Installer)</i></td> </tr> <tr> <td>category ID</td> <td><i>391a047e-0a21-4f4a-be76-835ca61515d8</i></td> </tr> <tr> <td>price list ID</td> <td><i>ffc5c4ad-7329-472e-aca6-b733c2ae47dd</i></td> </tr> </tbody> </table>	Parameters	Values	filter	<i>eq(Name:ACS_System_Installer)</i>	category ID	<i>391a047e-0a21-4f4a-be76-835ca61515d8</i>	price list ID	<i>ffc5c4ad-7329-472e-aca6-b733c2ae47dd</i>
Parameters	Values								
filter	<i>eq(Name:ACS_System_Installer)</i>								
category ID	<i>391a047e-0a21-4f4a-be76-835ca61515d8</i>								
price list ID	<i>ffc5c4ad-7329-472e-aca6-b733c2ae47dd</i>								
Request	<p>The following sample code enables you to get the products associated with the given price list and category, adhering to the other above-mentioned parameters.</p> <pre data-bbox="485 952 1426 1364"> 1 curl --request GET \ 2 --url 'https://rlp-dev.congacloud.io/api/ catalog/v1/categories/cf3e1894-7732-4de2- bc2d-171d3bafa563/products? filter=eq%28Name%3AACS_System_Installer%29' \ 3 --header 'PriceListId: 51432cec-268a-4d2f- a543-8b91f70cdb7c' \ 4 --header 'accept: application/json' \ 5 --header 'authorization: Bearer <Token></pre>								

Response	<p>For a leaf category, the API returns all products associated with it. If the ID of the root or sub-category (not a leaf category ID) is provided, the API returns all the products associated with all child categories.</p>
Response Body	
<pre> 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 </pre>	<pre> [{ "ConfigurationType": "Standalone", "Customizable": null, "Description": "ACS System Installer", "DisplayUrl": null, "EffectiveDate": "1900-01-01T00:00:00Z", "ExcludeFromSitemap": false, "ExpirationDate": "2100-12-31T00:00:00Z", "Family": null, "HasAttributes": false, "HasDefaults": false, "HasOptions": false, "HasSearchAttributes": false, "ImageURL": "https://i1.wp.com/ techforceservices.com.au/wp-content/uploads/ 2019/04/Conga.png?fit=584%2C190,ssl=1", "IsActive": true, "IsCustomizable": false, "IsTabViewEnabled": false, "ProductCode": "ACS System Installer", "ProductType": null, "QuantityUnitOfMeasure": null, "RenewalLeadTime": 0, "StockKeepingUnit": null, "Uom": "Each", "Version": 1, "TriggeringPrimaryLineNumbers": null, "RuleActionId": null, "CreatedBy": null, "CreatedDate": "2022-08-11T10:18:59.1461591Z", "Id": "ddc05e30-9406-4713-991e-ea9fb7d199db", "ModifiedBy": null, "ModifiedDate": "2022-09-06T14:22:43Z", "Name": "ACS System Installer", "Currency": null, </pre>

```

35     "ExternalId": null,
36     "Digest": null,
37     "CatAuto_Boolean_CstField_c": true,
38     "CatAuto_Currency_CstField_c": null,
39     "CatAuto_CustomFieldPickList_c": "USD",
40     "CatAuto_DateTime_CstField_c":
41     "2022-03-01T00:00:00Z",
42     "CatAuto_Double_CstField_c": 169,
43     "CatAuto_Int_CstField_c": 369,
44     "CatAuto_Multipicklist_CstField_c": [
45         "Red",
46         "Blue"
47     ],
48     "CatAuto_String_CstField_c": "AutoString_169",
49     "CreatedById": "27634e3f-904a-4321-9ce5-
50     c2edbe181d90",
51     "ModifiedById": "27634e3f-904a-4321-9ce5-
52     c2edbe181d90"
53 }
54 ]

```

Example 3

The following table lists the API method, endpoint, and path as well as a sample request and response to get only standalone products associated with a category and a corresponding price list.

Method	GET
Endpoint	/categories/{categoryId}/products

<p>Request URL</p>	<p>The following URL parameters are used to narrow down the search result to specifically retrieve the 1st standalone product on the third page that is associated with a category ID and a price list ID.</p> <table border="1" data-bbox="483 378 1426 929"> <thead> <tr> <th>Parameters</th> <th>Values</th> </tr> </thead> <tbody> <tr> <td>page</td> <td>10</td> </tr> <tr> <td>limit</td> <td>5</td> </tr> <tr> <td>filter</td> <td><i>eq(ConfigurationType:Standalone)</i></td> </tr> <tr> <td>category ID</td> <td>391a047e-0a21-4f4a-be76-835ca61515d8</td> </tr> <tr> <td>price list ID</td> <td><i>ffc5c4ad-7329-472e-aca6-b733c2ae47dd</i></td> </tr> </tbody> </table>	Parameters	Values	page	10	limit	5	filter	<i>eq(ConfigurationType:Standalone)</i>	category ID	391a047e-0a21-4f4a-be76-835ca61515d8	price list ID	<i>ffc5c4ad-7329-472e-aca6-b733c2ae47dd</i>
Parameters	Values												
page	10												
limit	5												
filter	<i>eq(ConfigurationType:Standalone)</i>												
category ID	391a047e-0a21-4f4a-be76-835ca61515d8												
price list ID	<i>ffc5c4ad-7329-472e-aca6-b733c2ae47dd</i>												
<p>Request</p>	<p>The following sample code enables you to get the products associated with the given price list and category, adhering to the other above-mentioned parameters.</p> <pre data-bbox="483 1122 1426 1579"> 1 curl --request GET \ 2 --url 'https://rlp-dev.congacloud.io/api/catalog/v1/categories/cf3e1894-7732-4de2-bc2d-171d3bafa563/products?page=3&limit=1&filter=eq%28ConfigurationType%3AStandalone%29' \ 3 --header 'PriceListId: 51432cec-268a-4d2f-a543-8b91f70cdb7c' \ 4 --header 'accept: application/json' \ 5 --header 'authorization: Bearer <Token></pre>												

Response

For a leaf category, the API returns all products associated with it. If the ID of the root or sub-category (not a leaf category ID) is provided, the API returns all the products associated with all child categories.

Response Body

```

1  [
2    {
3      "ConfigurationType": "Standalone",
4      "Customizable": null,
5      "Description": "ACS_Pagination_St_3",
6      "DisplayUrl": null,
7      "EffectiveDate": "1900-01-01T00:00:00Z",
8      "ExcludeFromSitemap": false,
9      "ExpirationDate": "2100-12-31T00:00:00Z",
10     "Family": null,
11     "HasAttributes": false,
12     "HasDefaults": false,
13     "HasOptions": false,
14     "HasSearchAttributes": false,
15     "ImageUrl": "https://i1.wp.com/
techforceservices.com.au/wp-content/uploads/
2019/04/Conga.png?fit=584%2C190,ssl=1",
16     "IsActive": true,
17     "IsCustomizable": false,
18     "IsTabViewEnabled": false,
19     "ProductCode": "ACS_Pagination_St_3",
20     "ProductType": null,
21     "QuantityUnitOfMeasure": null,
22     "RenewalLeadTime": 0,
23     "StockKeepingUnit": null,
24     "Uom": "Each",
25     "Version": 1,
26     "TriggeringPrimaryLineNumbers": null,
27     "RuleActionId": null,
28     "CreatedBy": null,
29     "CreatedDate": "2022-08-11T10:18:59.1461591Z",
30     "Id": "229a416f-1b52-4e60-95c5-a8aa78973209",
31     "ModifiedBy": null,
32     "ModifiedDate": "2022-09-06T14:22:41Z",
33     "Name": "ACS_Pagination_St_3",
34     "Currency": null,
35     "ExternalId": null,

```

```

36     "Digest": null,
37     "CatAuto_Boolean_CstField_c": false,
38     "CatAuto_Currency_CstField_c": null,
39     "CatAuto_CustomFieldPickList_c": "INR",
40     "CatAuto_DateTime_CstField_c":
41     "2015-03-01T00:00:00Z",
42     "CatAuto_Double_CstField_c": 126,
43     "CatAuto_Int_CstField_c": 326,
44     "CatAuto_Multipicklist_CstField_c": [
45         "Yellow",
46         "Green"
47     ],
48     "CatAuto_String_CstField_c": "AutoString_126",
49     "CreatedById": "27634e3f-904a-4321-9ce5-
c2edbe181d90",
50     "ModifiedById": "27634e3f-904a-4321-9ce5-
c2edbe181d90"
51 }
]
```

Retrieving Product Details

Retrieving products to view the details helps you explore the products before you add them to the cart. You can retrieve the product details using the `GET/products` endpoint. The API retrieves the following basic product details:

- Product header details, which includes Product Name, Description, Configuration Type, images associated, and if the product has options or attribute.
- Product pricing details
- Attributes and options associated with the product
- Recommended similar products

You can use the parameters available in the API to retrieve product details based on a specific requirement.

Method: GET

Endpoint: /products

API	Purpose
<pre>GET/products? page=1&limit=12&sort=asc(Name)</pre>	Retrieves the details of the first 12 products in the given pricelist and sorts them alphabetically based on the Product Names
<pre>GET/products? filers=eq(ConfigurationType='Standalone') &page=1&limit=12&sort=asc(Name)</pre>	Retrieves details of standalone products with the pricing details associated with them.
<pre>GET/products? filers=eq(ConfigurationType='Bundle') &includes=options&includes=price&page= 1&limit=12&sort=asc(Name)</pre>	Retrieve details of bundle products with their options and associated pricing details associated with them

Example API with Parameter Details and Responses

The following example is when we have to retrieve details of bundle products with their options and associated pricing details associated with them.

Pass the parameters in the `GET/products` API, as described in the following table.

Request	
<pre>'GET' \ 'https://<URL_of_the_Instance>/api/catalog/v1/products? filter=eq%28ConfigurationType%3A%27Bundle%27%29&includes=options&includes=price&sort= asc%28Name%29&page=1&limit=2'</pre>	
Parameters	Value
page	1
limit	2
sort	<i>asc(Name)</i>
filter	<i>ConfigurationType:'bundle'</i>

Parameters	Value
includes	<i>prices, options</i>
pricelist ID	<i>cbc75112-60e9-47b2-a632-f70d5912b70f</i>

Response

```
[
  {
    "ConfigurationType": "Bundle",
    "Customizable": null,
    "Description": null,
    "DisplayUrl": null,
    "EffectiveDate": "1900-01-01T00:00:00Z",
    "ExcludeFromSitemap": false,
    "ExpirationDate": "2100-12-31T00:00:00Z",
    "Family": "Hardware",
    "HasAttributes": false,
    "HasDefaults": false,
    "HasOptions": true,
    "HasSearchAttributes": false,
    "ImageURL": null,
    "IsActive": true,
    "IsCustomizable": false,
    "IsTabViewEnabled": false,
    "ProductCode": null,
    "ProductType": "Equipment",
    "QuantityUnitOfMeasure": null,
    "RenewalLeadTime": 0,
    "StockKeepingUnit": null,
    "Uom": "Each",
    "Version": 1,
    "TriggeringPrimaryLineNumbers": null,
    "RuleActionId": null,
    "CreatedBy": null,
    "CreatedDate": null,
    "Id": "beb90aeb-5b10-439c-b177-adf11a6ec63a",
    "ModifiedBy": null,
    "ModifiedDate": null,
    "Name": "3000 Series Memory",
```

```

    "Currency": null,
    "ExternalId": null,
    "Digest": null,
    "CatAuto_Boolean_CstField_c": null,
    "CatAuto_Currency_CstField_c": null,
    "CatAuto_CustomFieldPickList_c": null,
    "CatAuto_DateTime_CstField_c": null,
    "CatAuto_Double_CstField_c": null,
    "CatAuto_Int_CstField_c": null,
    "CatAuto_Multipicklist_CstField_c": null,
    "CatAuto_String_CstField_c": null
  },
  {
    "ConfigurationType": "Bundle",
    "Customizable": null,
    "Description": null,
    "DisplayUrl": null,
    "EffectiveDate": "1900-01-01T00:00:00Z",
    "ExcludeFromSitemap": false,
    "ExpirationDate": "2100-12-31T00:00:00Z",
    "Family": "Hardware",
    "HasAttributes": false,
    "HasDefaults": false,
    "HasOptions": true,
    "HasSearchAttributes": false,
    "ImageURL": null,
    "IsActive": true,
    "IsCustomizable": false,
    "IsTabViewEnabled": false,
    "ProductCode": null,
    "ProductType": "Equipment",
    "QuantityUnitOfMeasure": null,
    "RenewalLeadTime": 0,
    "StockKeepingUnit": null,
    "Uom": "Each",
    "Version": 1,
    "TriggeringPrimaryLineNumbers": null,
    "RuleActionId": null,
    "CreatedBy": null,
    "CreatedDate": null,
    "Id": "9dcb978a-6109-4465-a9fa-4363686e8cdb",
    "ModifiedBy": null,
    "ModifiedDate": null,
    "Name": "3200 Series Memory",

```

```
"Currency": null,  
"ExternalId": null,  
"Digest": null,  
"CatAuto_Boolean_CstField_c": null,  
"CatAuto_Currency_CstField_c": null,  
"CatAuto_CustomFieldPickList_c": null,  
"CatAuto_DateTime_CstField_c": null,  
"CatAuto_Double_CstField_c": null,  
"CatAuto_Int_CstField_c": null,  
"CatAuto_Multipicklist_CstField_c": null,  
"CatAuto_String_CstField_c": null  
}  
]
```

Interacting with the Cart

This use case describes how to interact with the cart, which stores details about the product you configure from the catalog, including options, attributes, and pricing configuration. Implementation teams can use these APIs to build a cart as necessary to prepare a product configuration by providing relevant details. These APIs also enable actions on the cart to activate and price the product configuration.

Retrieving a List of Carts

You can retrieve all carts with their details where the requester is the creator, owner of, or has access to the cart. Retrieving carts helps you explore the carts before you check them out. This API retrieves the following details:

- Cart name
- Effective date of the cart

Method: GET

Endpoint: /carts

You can use the query parameters available in the API to sort or filter carts based on specific requirements. For example, you have access to 1000 carts and retrieve them as follows.

API	Purpose
GET/carts? Page=1&limit=20&sort=asc(Name)	Retrieves only the first 2 carts sorted alphabetically based on cart names.
GET/carts? Page=1&limit=30&sort=desc(EffectiveDate)	Retrieves only the first 2 carts sorted based on the effective dates of carts in descending order.

For the following values:

Parameters	Value
page	1
limit	2
sort	desc(EffectiveDate)

The below is the request URL and after executing that:

Request
'GET' \'https://<URL_of_the_Instance>/api/cart/v1/carts?sort=asc%28Name%29&page=1&limit=2' \

You get the following response:

Response
[<pre> { "Account": { "Id": "d80484e9-6a11-4019-8bab-7733726f068a", "Name": "Auto_IncStartAndEndDateCR_Account001" }, "Ancestor": null, "ApprovalStatus": null, "BaseRelationCount": null, "BillingPreference": null, "BillToAccount": null, </pre>

```
"BusinessObjectId": null,
"BusinessObjectProfile": "Regular",
"BusinessObjectRefId": null,
"BusinessObjectType": "Agreement",
"Comments": null,
"ContractNumbers": null,
"CostRollupInfo": null,
"CouponCodes": null,
"CurrentUser": null,
"Description": "Cart1 Created with automation script",
"EffectiveDate": "2023-06-30T00:00:00",
"EffectivePriceList": {
  "Id": "ca40ab42-1756-4047-851e-29ca7568ed80",
  "Name": "Auto_IncStartAndEndDateCR_PL001"
},
"ExpectedEndDate": null,
"ExpectedStartDate": null,
"FinalizedDate": null,
"Intent": null,
"IsPricePending": false,
"IsTaskPending": false,
"IsTransient": false,
"IsValidationPending": false,
"LineItemsAwaitingPrice": null,
"LegalEntity": null,
"Location": null,
"NumberOfItems": 0,
"Order": null,
"ParentConfiguration": null,
"PaymentTerm": null,
"PriceList": {
  "Id": "ca40ab42-1756-4047-851e-29ca7568ed80",
  "Name": "Auto_IncStartAndEndDateCR_PL001"
},
"PricingDate": "2023-06-30T00:00:00",
"Primordial": null,
"PurchaseId": null,
"RenewalAdjustmentAmount": null,
"RenewalAdjustmentType": null,
"ShipToAccount": null,
"SplitCriteriaKey": null,
>Status": "New",
"SummaryGroupType": "Category",
```



```

"TaskCompletedDate": null,
"UseType": "Main",
"VersionNumber": null,
"ActivationDate": null,
"Id": "e42d09d9-6498-4b5b-8529-54a8826ab341",
"Name": "Auto_IncStartAndEndDateCR_Cart001",
"CreatedBy": {
  "Id": "27634e3f-904a-4321-9ce5-c2edbe181d90",
  "Name": "Test User"
},
"CreatedDate": "2022-11-16T01:09:06",
"ModifiedBy": {
  "Id": "27634e3f-904a-4321-9ce5-c2edbe181d90",
  "Name": "Test User"
},
"ModifiedDate": "2022-11-16T01:09:06",
"ExternalId": null,
"PDTest_CustomField_c": "Custom Field Default Value",
"ActivationDate_c": null
},
{
  "Account": {
    "Id": "c8a3e8e3-ceba-46a9-9dae-84058e8dd4a2",
    "Name": "Auto_IncStartAndEndDateCR_Account001"
  },
  "Ancestor": null,
  "ApprovalStatus": null,
  "BaseRelationCount": null,
  "BillingPreference": null,
  "BillToAccount": null,
  "BusinessObjectId": null,
  "BusinessObjectProfile": "Regular",
  "BusinessObjectRefId": null,
  "BusinessObjectType": "Agreement",
  "Comments": null,
  "ContractNumbers": null,
  "CostRollupInfo": null,
  "CouponCodes": null,
  "CurrentUser": null,
  "Description": "Cart1 Created with automation script",
  "EffectiveDate": "2023-06-30T00:00:00",
  "EffectivePriceList": {
    "Id": "8f58849c-ae90-4040-865d-8c67432e0ae1",
    "Name": "Auto_IncStartAndEndDateCR_PL001"
  }
}

```

```

    },
    "ExpectedEndDate": null,
    "ExpectedStartDate": null,
    "FinalizedDate": null,
    "Intent": null,
    "IsPricePending": false,
    "IsTaskPending": false,
    "IsTransient": false,
    "IsValidPending": false,
    "LineItemsAwaitingPrice": null,
    "LegalEntity": null,
    "Location": null,
    "NumberOfItems": 0,
    "Order": null,
    "ParentConfiguration": null,
    "PaymentTerm": null,
    "PriceList": {
      "Id": "8f58849c-ae90-4040-865d-8c67432e0ae1",
      "Name": "Auto_IncStartAndEndDateCR_PL001"
    },
    },
    "PricingDate": "2023-06-30T00:00:00",
    "Primordial": null,
    "PurchaseId": null,
    "RenewalAdjustmentAmount": null,
    "RenewalAdjustmentType": null,
    "ShipToAccount": null,
    "SplitCriteriaKey": null,
    "Status": "New",
    "SummaryGroupType": "Category",
    "TaskCompletedDate": null,
    "UseType": "Main",
    "VersionNumber": null,
    "ActivationDate": null,
    "Id": "72da7e2d-0fb5-49c3-9124-efc819ee424",
    "Name": "Auto_IncStartAndEndDateCR_Cart001",
    "CreatedBy": {
      "Id": "27634e3f-904a-4321-9ce5-c2edbe181d90",
      "Name": "Test User"
    },
    },
    "CreatedDate": "2022-11-15T14:48:59",
    "ModifiedBy": {
      "Id": "27634e3f-904a-4321-9ce5-c2edbe181d90",
      "Name": "Test User"
    }
  }

```

```
    },  
    "ModifiedDate": "2022-11-15T14:48:59",  
    "ExternalId": null,  
    "PDTest_CustomField_c": "Custom Field Default Value",  
    "ActivationDate_c": null  
  }  
]
```

Activating a Cart

Of all carts, only one cart can be active. You can activate a cart that is in the "New" status only. You cannot activate a cart in other statuses such as Finalized, Superseded, Suspended, Abandoned, or Deleted. Activating a cart does not change anything on the cart, except marking the cart as "Active". This API allows you to work on any existing cart that is not checked out yet.

Method: POST

Endpoint: /carts/{CartId}/activate

For example, you want to activate a cart with the cart ID b6c8762a-2c14-49b0-9a46-bebe4044c919. Execute the following API:

```
POST/carts/b6c8762a-2c14-49b0-9a46-bebe4044c919/activate
```

Retrieving Cart Details (Header Information)

You can retrieve the header details of a cart. This API retrieves the following details among others:

- Cart name
- Price list
- Account
- Effective date
- Link to the business object if the cart is finalized

Method: GET

Endpoint: /carts/{cartId}

For example, the following sample code enables you to get the header details of a cart with the cart ID e42d09d9-6498-4b5b-8529-54a8826ab34.

Request

```
'GET' \ 'https://<URL_of_the_Instance>/api/cart/v1/carts/
e42d09d9-6498-4b5b-8529-54a8826ab341' \
```

You get the following response:

Response

```
{
  "Account": {
    "Id": "d80484e9-6a11-4019-8bab-7733726f068a",
    "Name": "Auto_IncStartAndEndDateCR_Account001"
  },
  "Ancestor": null,
  "ApprovalStatus": null,
  "BaseRelationCount": null,
  "BillingPreference": null,
  "BillToAccount": null,
  "BusinessObjectId": null,
  "BusinessObjectProfile": "Regular",
  "BusinessObjectRefId": null,
  "BusinessObjectType": "Agreement",
  "Comments": null,
  "ContractNumbers": null,
  "CostRollupInfo": null,
  "CouponCodes": null,
  "CurrentUser": null,
  "Description": "Cart1 Created with automation script",
  "EffectiveDate": "2023-06-30T00:00:00",
  "EffectivePriceList": {
    "Id": "ca40ab42-1756-4047-851e-29ca7568ed80",
    "Name": "Auto_IncStartAndEndDateCR_PL001"
  },
  "ExpectedEndDate": null,
  "ExpectedStartDate": null,
  "FinalizedDate": null,
  "Intent": null,
  "IsPricePending": false,
  "IsTaskPending": false,
  "IsTransient": false,
```

```

    "IsValidationPending": false,
    "LineItemsAwaitingPrice": null,
    "LegalEntity": null,
    "Location": null,
    "NumberOfItems": 0,
    "Order": null,
    "ParentConfiguration": null,
    "PaymentTerm": null,
    "PriceList": {
      "Id": "ca40ab42-1756-4047-851e-29ca7568ed80",
      "Name": "Auto_IncStartAndEndDateCR_PL001"
    },
    "PricingDate": "2023-06-30T00:00:00",
    "Primordial": null,
    "PurchaseId": null,
    "RenewalAdjustmentAmount": null,
    "RenewalAdjustmentType": null,
    "ShipToAccount": null,
    "SplitCriteriaKey": null,
    "Status": "New",
    "SummaryGroupType": "Category",
    "TaskCompletedDate": null,
    "UseType": "Main",
    "VersionNumber": null,
    "ActivationDate": null,
    "Id": "e42d09d9-6498-4b5b-8529-54a8826ab341",
    "Name": "Auto_IncStartAndEndDateCR_Cart001",
    "CreatedBy": {
      "Id": "27634e3f-904a-4321-9ce5-c2edbe181d90",
      "Name": "Test User"
    },
    "CreatedDate": "2022-11-16T01:09:06",
    "ModifiedBy": {
      "Id": "27634e3f-904a-4321-9ce5-c2edbe181d90",
      "Name": "Test User"
    },
    "ModifiedDate": "2022-11-16T01:09:06",
    "ExternalId": null,
    "PDTest_CustomField_c": "Custom Field Default Value",
    "ActivationDate_c": null
  }
}

```

Retrieving Line Items of the Cart

You can retrieve all line items in a cart, with their details. The API retrieves the following details:

- Cart header fields
- Primary line items
- Secondary line items associated with the primary line items such as options and charge types

Method: GET

Endpoint: /carts/{cartId}/items

For example, you want to get the details of all line items in a cart with the cart ID e42d09d9-6498-4b5b-8529-54a8826ab341. Execute the following API:

Request
'GET' \ 'https://<URL_of_the_Instance>/api/cart/v1/carts/e42d09d9-6498-4b5b-8529-54a8826ab341/items'

You can use the query parameters available in the API to sort or filter cart line items based on specific requirements. For example, a cart with the cart ID b6c8762a-2c14-49b0-9a46-bebe4044c919 has 1000 cart line items and you retrieve them as follows.

API	Purpose
GET/carts/{b6c8762a-2c14-49b0-9a46-bebe4044c919}/items?page=1&limit=20&sort=asc(Name)	Retrieves only the first 20 cart line items sorted alphabetically based on their names.

Adding Line Items to the Cart

You can add one or more standalone, bundle, and option products to the cart. You can add bundle line items with the default or modified configuration. You cannot add products to a cart in the Finalized, Superseded, or Deleted status.

Method: POST

Endpoint: /carts/{cartId}/items

For example, you want to add line items to a cart with the cart ID b6c8762a-2c14-49b0-9a46-bebe4044c919. Execute the following API:

```
POST/carts/b6c8762a-2c14-49b0-9a46-bebe4044c919/items
```

You must pass the product ID in the request body to add the product to the cart. You can add products with different field values.

Scenarios

- In the following example, you add multiple standalone products with different field values. You pass the following parameters in the request body:

Request Body
<pre>[{ "PrimaryTxnLineNumber": 100001, "Product": { "Id": "44a35bef-6d8d-420a-9d7a-3c443c304f05", "Name": "Product_1" }, "ExternalId": "45c8a8c8-7b94-419f-94b0-9e8f14d35696", "LineType": "Product/Service", "PricingStatus": "Pending", "Quantity": 1 }, { "PrimaryTxnLineNumber": 100002, "Product": { "Id": "ad590285-ac23-4182-9137-9a1b294842f2", "Name": "Product_2" }, "ExternalId": "beed1ffe-1317-4bbb-a3b9-6a57c303a43a", "LineType": "Product/Service", "PricingStatus": "Pending", "Quantity": 1 }, { "PrimaryTxnLineNumber": 100003, "Product": { "Id": "71dda149-7dcc-4f37-8c67-a5c4b927afe5",</pre>

```

        "Name": "Product_3"
      },
      "ExternalId": "f49c3693-d1ee-4590-83f3-f30102fef080",
      "LineType": "Product/Service",
      "PricingStatus": "Pending",
      "Quantity": 1
    }
  ]

```

- In the following example, you add option to the Bundle products. You pass the following parameters in the request body:

```

[
  {
    "IsPrimaryLine": true,
    "LineType": "Product/Service",
    "PricingStatus": "Pending",
    "Product": {
      "Id": "9872ad8d-87c7-4a7c-ab49-c9332ce2fb0e",
      "Name": "n1"
    },
    "ExternalId": "Auto_BundleOnly_LineItem001",
    "PrimaryTxnLineNumber": 1,
    "StartDate": "2024-01-01",
    "EndDate": "2024-01-31",
    "AdjustmentAmount": 10.123456789,
    "AdjustmentType": "% Discount"
  },
  {
    "IsPrimaryLine": true,
    "LineType": "Option",
    "TxnParentBundleNumber": "1",
    "Option": {
      "Id": "9872ad8d-87c7-4a7c-ab19-c9332ce2fb0e",
      "Name": "n2"
    },
    "PricingStatus": "Pending",
    "Product": {
      "Id": "9872ad8d-87c7-4a7c-ab49-c9332ce2fb0e",
      "Name": "n1"
    },
    "ExternalId": "Auto_BundleOption_LineItem002",

```



```

    "PrimaryTxnLineNumber": 2
  }
]

```

Updating an Existing Cart Item

You can update one or more existing cart line items by providing details of the following fields in the request body:

- Quantity
- Selling Term
- Start Date
- End Date
- Adjustment Amount
- Adjustment Type

You cannot update custom fields. You cannot update line items in a cart in the Finalized, Superseded, or Deleted status.

Method: PATCH

Endpoint: /carts/{cartId}/items

For example, you want to update line items in a cart with the cart ID b6c8762a-2c14-49b0-9a46-bebe4044c919. Execute the following API:

```
PATCH/carts/b6c8762a-2c14-49b0-9a46-bebe4044c919/items
```

In the request body, you must pass the product ID and the required fields with values to update the cart line items.

Scenarios

- In the following example, you update the quantity of an existing cart line item.

```

[
  {
    "PrimaryTxnLineNumber": "1",
    "ProductId": "6e6619b8-8d2e-4686-af69-b16e683b98f9",
    "LineType": "Product/Service",
    "LineNumber" : 1,
    "PrimaryLineNumber" :1,
    "PricingStatus": "Pending",
  }
]

```

```

    "Id": "494f0297-d63a-46b1-a71a-689ad5409a3f",
    "Quantity": 10,
    "ExternalId": "Standalone"
  }
]

```

- In the following example, you update the selling term of an existing cart line item:

```

[
  {
    "PrimaryTxnLineNumber": "1",
    "ProductId": "6e6619b8-8d2e-4686-af69-b16e683b98f9",
    "LineType": "Product/Service",
    "LineNumber": 1,
    "PrimaryLineNumber": 1,
    "PricingStatus": "Pending",
    "Id": "494f0297-d63a-46b1-a71a-689ad5409a3f",
    "Quantity": 10,
    "ExternalId": "Standalone",
    "SellingTerm" : 5
  }
]

```

Removing Line Items from the Cart

You can remove one or more line items from the cart. You cannot remove line items from a cart in the Finalized, Superseded, or Deleted status.

Method: DELETE

Endpoint: /carts/{cartId}/items

For example, you want to remove line items from a cart with the cart ID b6c8762a-2c14-49b0-9a46-bebe4044c919. Execute the following API:

```
DELETE/carts/b6c8762a-2c14-49b0-9a46-bebe4044c919/items
```

In the request body, you provide IDs of cart line items to remove the associated records from the cart.

Scenario

In the following example, you remove one cart line item.

```
[
  {
    "LineNumber": 0
  },
  {
    "CartItemId": "3fa85f64-5717-4562-b3fc-2c963f66afa6"
  }
]
```

Run Pricing on the Cart

You must calculate pricing on the cart whenever you add any product(s) to the cart and/or configure products from the catalog. CPQ does not run pricing on the cart by default, so you must do it explicitly. Following are some of the scenarios to call this API:

- Adding a standalone product to the cart
- Adding a bundle product and configuring its options
- Selecting different charge types
- Configuring product attributes or modifying them
- Changing the default quantity (that is 1) on the Catalog page while adding/configuring the products
- Deselecting an added product from the catalog

You must also perform repricing of the cart whenever you update the cart. Following are some of the scenarios to reprice the cart:

- Changing any cart line item fields such as Quantity, Selling Term, Start Date, End Date, Base Price
- Applying any kind of adjustments on any cart line item
- Performing actions such Mass Update
- Adding or removing any line item
- Configuring any line item for options, attributes, or other parameters

Method: POST

Endpoint: /carts/{cartId}/price

For example, you want to price or reprice a cart with the cart ID b6c8762a-2c14-49b0-9a46-bebe4044c919. Execute the following API:

```
POST/carts/b6c8762a-2c14-49b0-9a46-bebe4044c919/price
```

Deleting a Cart

You can delete a cart when it is no longer required. A deleted cart record is not stored so you cannot access it after deletion.

Method: DELETE

Endpoint: /carts/{cartId}

For example, you want to delete a cart with the cart ID b6c8762a-2c14-49b0-9a46-bebe4044c919. Execute the following API:

```
DELETE/carts/b6c8762a-2c14-49b0-9a46-bebe4044c919
```

Creating and Editing Quotes

This use case describes how to create and edit quotes, which is a formal statement of promise that lists the products and services to be sold to a customer at a defined price. Quote creation involves configuring products and services, pricing them, and generating quotes based on predefined rules. Implementation teams can use these APIs to build quoting functionalities necessary to prepare a quote by providing relevant details.

Creating a Quote

You can create one or more quotes by providing the quote name, price list ID, and price list name in the request. Provide other relevant quote details as it is a good practice to pass as many fields in the request body as are needed to pre-populate the quote. For example, it is recommended to populate the Account related fields.

Prerequisite

You must gather the following details to create a quote.

- Price List ID
- Price List Name

You can use the [GET/price-lists](#) API to retrieve all price lists in the system. For more information, see Pricing Setup APIs.

Example 1

The following table lists the API method, endpoint, and path as well as a sample request and response for creating a quote.

Method	POST
Endpoint	/quotes
Request URL	https://<URL_of_the_Instance>/api/quote/v1/quotes
Request	<p>The following sample request creates a quote named Tier_1, with AutoQuoteRLP_QuotePL pricelist.</p> <pre> 1 [2 { 3 "Account": { 4 "Id": "e60f1de6-6b54-4304-a600-31c226b842db", 5 "Name": "AutoQuoteRLPAccount_" 6 }, 7 "Currency": "USD", 8 "Description": 9 "AutoQuoteService_Description1667823791262_57", 10 "Location": { 11 "Id": "7b363b21-2d8b-4277-b14e-0698ccd6bbd8", 12 "Name": "Ahmedabad" 13 }, 14 "Opportunity": { 15 "Id": "9129aa7e-2ad5-430f-b456-49d62eeaed87", 16 "Name": "AutoQuoteRLPOpportunity" 17 }, 18 "PriceList": { 19 "Id": "8bea2478-428c-4421-afcd-97e327dad477", 20 "Name": "AutoQuoteRLP_QuotePL" 21 }, 22 "ProposalCategory": "Quote", 23 "Name": "Tier_1" 24 } </pre>

Response

The API returns the structure of the newly created quote, which includes all associated field values that are populated by default or overridden based on the request body.

Response Body

```

1  [
2    {
3      "ABOType": "New",
4      "Account": {
5        "Id": "e60f1de6-6b54-4304-a600-31c226b842db",
6        "Name": "AutoQuoteRLPAccount_"
7      },
8      "Amount": null,
9      "ApprovalStage": "Draft",
10     "AutoActivateOrder": false,
11     "AutoCreateBill": false,
12     "AutoCreateRevenue": false,
13     "BillingPreference": null,
14     "BillToAccount": null,
15     "ConfigurationEffectiveDate": null,
16     "ConfigurationFinalizedDate": null,
17     "ConfigurationSyncDate": null,
18     "Currency": "USD",
19     "Description":
20     "AutoQuoteService_Description1667823791262_57",
21     "DisableCartVersioning": false,
22     "DiscountPercent": null,
23     "ExpectedEndDate": null,
24     "ExpectedStartDate": null,
25     "GrandTotal": null,
26     "Intent": null,
27     "InternalDeadline": null,
28     "IsAutoAccepted": false,
29     "IsPrimary": true,
30     "IsSystemGenerated": false,
31     "IsTaskPending": false,
32     "LegalEntity": null,
33     "Location": {
34       "Id": "7b363b21-2d8b-4277-b14e-0698ccd6bbd8",
35       "Name": "Ahmedabad"
36     },
37   },
38 ]

```

```
36     "NetAmount": null,  
37     "Opportunity": {  
38         "Id": "9129aa7e-2ad5-430f-b456-49d62eeaed87",  
39         "Name": "AutoQuoteRLPOpportunity"  
40     },  
41     "ParentProposal": null,  
42     "PartnerAccount": null,  
43     "ProposalPaymentTerm": "Net 30 Days",  
44     "PaymentTerm": null,  
45     "PODate": null,  
46     "PONumber": null,  
47     "PresentedDate": null,  
48     "PriceList": {  
49         "Id": "8bea2478-428c-4421-afcd-97e327dad477",  
50         "Name": "AutoQuoteRLP_QuotePL"  
51     },  
52     "PricingDate": null,  
53     "PrimaryContact": null,  
54     "ProposalApprovalDate": null,  
55     "ProposalCategory": "Quote",  
56     "ProposalExpirationDate": null,  
57     "ProposalName": null,  
58     "PurchaseId": null,  
59     "QTCProfile": null,  
60     "ReadyForActivationDate": null,  
61     "ReadyForBillingDate": null,  
62     "ReadyForFulfillmentDate": null,  
63     "ReadyForRevRecDate": null,  
64     "ReadyToGenerate": true,  
65     "ReadyToPresent": true,  
66     "RelatedProposal": null,  
67     "RFPIntakeDate": null,  
68     "RFPResponseDueDate": null,  
69     "RFPStage": null,  
70     "RFPValue": null,  
71     "RiskFactors": null,  
72     "SalesTaxAmount": null,  
73     "SalesTaxPercent": null,  
74     "ShippingHandling": null,  
75     "ShipToAccount": null,  
76     "SingleTransactionAdjustment": false,  
77     "SourceChannel": "Direct",  
78     "SpecialTerms": null,  
79     "StrategicImportance": null,
```

```

80     "SyncAssetChangesToQuote": true,
81     "UseType": "Main",
82     "ValidUntilDate": null,
83     "Id": "75723d17-937e-4213-89f8-41a8f2c81594",
84     "Name": "Tier_1",
85     "CreatedBy": {
86         "Id": "d717a075-9cbf-480c-b230-837e0e6dee75",
87         "Name": "<Test_Username>"
88     },
89     "CreatedDate": "2022-12-27T18:54:56.3326618",
90     "ModifiedBy": {
91         "Id": "d717a075-9cbf-480c-b230-837e0e6dee75",
92         "Name": "<Test_Username> "
93     },
94     "ModifiedDate": "2022-12-27T18:54:56.3326618",
95     "ExternalId": null,
96     "QuoteAuto_PickList_CstField_c": null,
97     "QuoteAuto_String_CstField_c": null,
98     "QuoteAuto_Double_CstField_c": null,
99     "QuoteAuto_Int_CstField_c": null,
100    "QuoteAuto_Boolean_CstField_c": null,
101    "QuoteAuto_Currency_CstField_c": null,
102    "QuoteAuto_DateTime_CstField_c": null,
103    "QuoteAuto_Multipicklist_CstField_c": null
104 }
105 ]

```

Example 2

The following table list the API method, endpoints, and sample codes for request and responses to create more than one quote:

Method	POST
Endpoint	/quotes
Request URL	https://<URL_of_the_Instance>/api/quote/v1/quotes

Request

The following sample code creates quotes with the following names with *AutoQuoteRLP_QuotePL* pricelist.

- *Tier_2*
- *Tier_3*

```

1  [
2    {
3      "Name": "Tier_2",
4      "ProposalCategory": "Quote",
5      "PriceList": {
6        "Id": "8bea2478-428c-4421-
afcd-97e327dad477",
7        "Name": "AutoQuoteRLP_QuotePL"
8      },
9      "Account": {
10       "Id": "e60f1de6-6b54-4304-
a600-31c226b842db",
11       "Name": "AutoQuoteRLPAccount_"
12     },
13     "Description": "Tier 2 Quote",
14     "Location": {
15       "Id": "7b363b21-2d8b-4277-
b14e-0698ccd6bbd8",
16       "Name": "Ahmedabad"
17     },
18     "Opportunity": {
19       "Id": "9129aa7e-2ad5-430f-
b456-49d62eeaed87",
20       "Name": "AutoQuoteRLPOpportunity"
21     }
22   },
23   {
24     "Name": "Tier_3",
25     "ProposalCategory": "Quote",
26     "PriceList": {
27       "Id": "8bea2478-428c-4421-
afcd-97e327dad477",
28       "Name": "AutoQuoteRLP_QuotePL"
29     },
30     "Account": {

```

```
31         "Id": "e60f1de6-6b54-4304-  
a600-31c226b842db",  
32         "Name": "AutoQuoteRLPAccount_"  
33     },  
34     "Currency": "USD",  
35     "Description": "Tier 3 Quote",  
36     "Location": {  
37         "Id": "7b363b21-2d8b-4277-  
b14e-0698ccd6bbd8",  
38         "Name": "Ahmedabad"  
39     },  
40     "Opportunity": {  
41         "Id": "9129aa7e-2ad5-430f-  
b456-49d62eeaed87",  
42         "Name": "AutoQuoteRLPOpportunity"  
43     }  
44 }  
45 ]
```

Response	The API returns the structure of the newly created quotes.
	<p style="text-align: center;">Response Body</p>
	<pre> 1 [2 { 3 "ABOType": "New", 4 "Account": { 5 "Id": "e60f1de6-6b54-4304-a600-31c226b842db", 6 "Name": "AutoQuoteRLPAccount_" 7 }, 8 "Amount": null, 9 "ApprovalStage": "Draft", 10 "AutoActivateOrder": false, 11 "AutoCreateBill": false, 12 "AutoCreateRevenue": false, 13 "BillingPreference": null, 14 "BillToAccount": null, 15 "ConfigurationEffectiveDate": null, 16 "ConfigurationFinalizedDate": null, 17 "ConfigurationSyncDate": null, 18 "Currency": "USD", 19 "Description": "Tier 2 Quote", 20 "DisableCartVersioning": false, 21 "DiscountPercent": null, 22 "ExpectedEndDate": null, 23 "ExpectedStartDate": null, 24 "GrandTotal": null, 25 "Intent": null, 26 "InternalDeadline": null, 27 "IsAutoAccepted": false, 28 "IsPrimary": true, 29 "IsSystemGenerated": false, 30 "IsTaskPending": false, 31 "LegalEntity": null, 32 "Location": { 33 "Id": "7b363b21-2d8b-4277-b14e-0698ccd6bbd8", 34 "Name": "Ahmedabad" 35 }, 36 "NetAmount": null, 37 "Opportunity": { 38 "Id": "9129aa7e-2ad5-430f-b456-49d62eeaed87", 39 "Name": "AutoQuoteRLPOpportunity" </pre>

```
40 },
41 "ParentProposal": null,
42 "PartnerAccount": null,
43 "ProposalPaymentTerm": "Net 30 Days",
44 "PaymentTerm": null,
45 "PODate": null,
46 "PONumber": null,
47 "PresentedDate": null,
48 "PriceList": {
49   "Id": "8bea2478-428c-4421-afcd-97e327dad477",
50   "Name": "AutoQuoteRLP_QuotePL"
51 },
52 "PricingDate": null,
53 "PrimaryContact": null,
54 "ProposalApprovalDate": null,
55 "ProposalCategory": "Quote",
56 "ProposalExpirationDate": null,
57 "ProposalName": null,
58 "PurchaseId": null,
59 "QTCProfile": null,
60 "ReadyForActivationDate": null,
61 "ReadyForBillingDate": null,
62 "ReadyForFulfillmentDate": null,
63 "ReadyForRevRecDate": null,
64 "ReadyToGenerate": true,
65 "ReadyToPresent": true,
66 "RelatedProposal": null,
67 "RFPIntakeDate": null,
68 "RFPResponseDueDate": null,
69 "RFPStage": null,
70 "RFPValue": null,
71 "RiskFactors": null,
72 "SalesTaxAmount": null,
73 "SalesTaxPercent": null,
74 "ShippingHandling": null,
75 "ShipToAccount": null,
76 "SingleTransactionAdjustment": false,
77 "SourceChannel": "Direct",
78 "SpecialTerms": null,
79 "StrategicImportance": null,
80 "SyncAssetChangesToQuote": true,
81 "UseType": "Main",
82 "ValidUntilDate": null,
```

```

83     "Id": "8cae6d8a-2a3b-4c1c-bf64-8ddef14dc863",
84     "Name": "Tier_2",
85     "CreatedBy": {
86         "Id": "d717a075-9cbf-480c-b230-837e0e6dee75",
87         "Name": "Test Manish User"
88     },
89     "CreatedDate": "2022-12-27T20:04:29.9468282",
90     "ModifiedBy": {
91         "Id": "d717a075-9cbf-480c-b230-837e0e6dee75",
92         "Name": "Test Manish User"
93     },
94     "ModifiedDate": "2022-12-27T20:04:29.9468282",
95     "ExternalId": null,
96     "QuoteAuto_PickList_CstField_c": null,
97     "QuoteAuto_String_CstField_c": null,
98     "QuoteAuto_Double_CstField_c": null,
99     "QuoteAuto_Int_CstField_c": null,
100    "QuoteAuto_Boolean_CstField_c": null,
101    "QuoteAuto_Currency_CstField_c": null,
102    "QuoteAuto_DateTime_CstField_c": null,
103    "QuoteAuto_Multipicklist_CstField_c": null
104 },
105 {
106     "ABOType": "New",
107     "Account": {
108         "Id": "e60f1de6-6b54-4304-a600-31c226b842db",
109         "Name": "AutoQuoteRLPAccount_"
110     },
111     "Amount": null,
112     "ApprovalStage": "Draft",
113     "AutoActivateOrder": false,
114     "AutoCreateBill": false,
115     "AutoCreateRevenue": false,
116     "BillingPreference": null,
117     "BillToAccount": null,
118     "ConfigurationEffectiveDate": null,
119     "ConfigurationFinalizedDate": null,
120     "ConfigurationSyncDate": null,
121     "Currency": "USD",
122     "Description": "Tier 3 Quote",
123     "DisableCartVersioning": false,
124     "DiscountPercent": null,
125     "ExpectedEndDate": null,
126     "ExpectedStartDate": null,

```

```
127     "GrandTotal": null,  
128     "Intent": null,  
129     "InternalDeadline": null,  
130     "IsAutoAccepted": false,  
131     "IsPrimary": true,  
132     "IsSystemGenerated": false,  
133     "IsTaskPending": false,  
134     "LegalEntity": null,  
135     "Location": {  
136         "Id": "7b363b21-2d8b-4277-b14e-0698ccd6bbd8",  
137         "Name": "Ahmedabad"  
138     },  
139     "NetAmount": null,  
140     "Opportunity": {  
141         "Id": "9129aa7e-2ad5-430f-b456-49d62eeaed87",  
142         "Name": "AutoQuoteRLPOpportunity"  
143     },  
144     "ParentProposal": null,  
145     "PartnerAccount": null,  
146     "ProposalPaymentTerm": "Net 30 Days",  
147     "PaymentTerm": null,  
148     "PODate": null,  
149     "PONumber": null,  
150     "PresentedDate": null,  
151     "PriceList": {  
152         "Id": "8bea2478-428c-4421-afcd-97e327dad477",  
153         "Name": "AutoQuoteRLP_QuotePL"  
154     },  
155     "PricingDate": null,  
156     "PrimaryContact": null,  
157     "ProposalApprovalDate": null,  
158     "ProposalCategory": "Quote",  
159     "ProposalExpirationDate": null,  
160     "ProposalName": null,  
161     "PurchaseId": null,  
162     "QTCProfile": null,  
163     "ReadyForActivationDate": null,  
164     "ReadyForBillingDate": null,  
165     "ReadyForFulfillmentDate": null,  
166     "ReadyForRevRecDate": null,  
167     "ReadyToGenerate": true,  
168     "ReadyToPresent": true,  
169     "RelatedProposal": null,
```

```
170     "RFPIntakeDate": null,  
171     "RFPResponseDueDate": null,  
172     "RFPStage": null,  
173     "RFPValue": null,  
174     "RiskFactors": null,  
175     "SalesTaxAmount": null,  
176     "SalesTaxPercent": null,  
177     "ShippingHandling": null,  
178     "ShipToAccount": null,  
179     "SingleTransactionAdjustment": false,  
180     "SourceChannel": "Direct",  
181     "SpecialTerms": null,  
182     "StrategicImportance": null,  
183     "SyncAssetChangesToQuote": true,  
184     "UseType": "Main",  
185     "ValidUntilDate": null,  
186     "Id": "4d444f87-ff0c-4955-b742-74576f86ba58",  
187     "Name": "Tier_3",  
188     "CreatedBy": {  
189         "Id": "d717a075-9cbf-480c-b230-837e0e6dee75",  
190         "Name": "Test Manish User"  
191     },  
192     "CreatedDate": "2022-12-27T20:04:29.9477331",  
193     "ModifiedBy": {  
194         "Id": "d717a075-9cbf-480c-b230-837e0e6dee75",  
195         "Name": "Test Manish User"  
196     },  
197     "ModifiedDate": "2022-12-27T20:04:29.9477331",  
198     "ExternalId": null,  
199     "QuoteAuto_PickList_CstField_c": null,  
200     "QuoteAuto_String_CstField_c": null,  
201     "QuoteAuto_Double_CstField_c": null,  
202     "QuoteAuto_Int_CstField_c": null,  
203     "QuoteAuto_Boolean_CstField_c": null,  
204     "QuoteAuto_Currency_CstField_c": null,  
205     "QuoteAuto_DateTime_CstField_c": null,  
206     "QuoteAuto_Multipicklist_CstField_c": null  
207 }  
208 ]
```

Retrieving List of Quotes

You can retrieve all quotes with their details where the requester is the creator, owner of, or has access to the quote. Retrieving quotes helps you explore the quote as it moves through the quote life cycle.

Prerequisite

You must have existing quotes in the system which you have created or that you own or have access to.

Example

The following table lists the API method, endpoints, and sample codes for request and response, to retrieve a quote:

Method	GET										
Endpoint	/quotes										
Request Parameters	<p>The following URL parameters are used to narrow down the search result to specifically retrieve quote names containing the string "Tier".</p> <table border="1"> <thead> <tr> <th>Parameters</th> <th>Values</th> </tr> </thead> <tbody> <tr> <td>page</td> <td>1</td> </tr> <tr> <td>limit</td> <td>2</td> </tr> <tr> <td>sort</td> <td>asc(Name)</td> </tr> <tr> <td>filter</td> <td>like(Name: 'Tier')</td> </tr> </tbody> </table>	Parameters	Values	page	1	limit	2	sort	asc(Name)	filter	like(Name: 'Tier')
Parameters	Values										
page	1										
limit	2										
sort	asc(Name)										
filter	like(Name: 'Tier')										
Request URL	<pre>https://<URL_of_the_Instance>/api/quote/v1/quotes? filter=like%28Name%3A%20%27Tier%27%20%29&sort=asc%28Name%29&page =1&limit=2</pre>										

Response

The API returns all details associated with the retrieved quotes.

Response Body

```

1  [
2    {
3      "ABOType": "New",
4      "Account": {
5        "Id": "e60f1de6-6b54-4304-
a600-31c226b842db",
6        "Name": "AutoQuoteRLPAccount_"
7      },
8      "Amount": null,
9      "ApprovalStage": "Draft",
10     "AutoActivateOrder": false,
11     "AutoCreateBill": false,
12     "AutoCreateRevenue": false,
13     "BillingPreference": null,
14     "BillToAccount": null,
15     "ConfigurationEffectiveDate": null,
16     "ConfigurationFinalizedDate": null,
17     "ConfigurationSyncDate": null,
18     "Currency": "USD",
19     "Description":
"AutoQuoteService_Description1667823791262_57",
20     "DisableCartVersioning": false,
21     "DiscountPercent": null,
22     "ExpectedEndDate": null,
23     "ExpectedStartDate": null,
24     "GrandTotal": null,
25     "Intent": null,
26     "InternalDeadline": null,
27     "IsAutoAccepted": false,
28     "IsPrimary": true,
29     "IsSystemGenerated": false,
30     "IsTaskPending": false,
31     "LegalEntity": null,
32     "Location": {
33       "Id": "7b363b21-2d8b-4277-
b14e-0698ccd6bbd8",
34       "Name": "Ahmedabad"
35     },
36     "NetAmount": null,

```

```
37     "Opportunity": {
38         "Id": "9129aa7e-2ad5-430f-
4156-49d62eeaed87",
39         "Name": "AutoQuoteRLPOpportunity"
40     },
41     "ParentProposal": null,
42     "PartnerAccount": null,
43     "ProposalPaymentTerm": "Net 30 Days",
44     "PaymentTerm": null,
45     "PODate": null,
46     "PONumber": null,
47     "PresentedDate": null,
48     "PriceList": {
49         "Id": "8bea2478-428c-4421-
5056cd-97e327dad477",
51         "Name": "AutoQuoteRLP_QuotePL"
52     },
53     "PricingDate": null,
54     "PrimaryContact": null,
55     "ProposalApprovalDate": null,
56     "ProposalCategory": "Quote",
57     "ProposalExpirationDate": null,
58     "ProposalName": null,
59     "PurchaseId": null,
60     "QTCProfile": null,
61     "ReadyForActivationDate": null,
62     "ReadyForBillingDate": null,
63     "ReadyForFulfillmentDate": null,
64     "ReadyForRevRecDate": null,
65     "ReadyToGenerate": true,
66     "ReadyToPresent": true,
67     "RelatedProposal": null,
68     "RFPIntakeDate": null,
69     "RFPResponseDueDate": null,
70     "RFPStage": null,
71     "RFPValue": null,
72     "RiskFactors": null,
73     "SalesTaxAmount": null,
74     "SalesTaxPercent": null,
75     "ShippingHandling": null,
76     "ShipToAccount": null,
77     "SingleTransactionAdjustment": false,
78     "SourceChannel": "Direct",
```

```

78     "SpecialTerms": null,
79     "StrategicImportance": null,
80     "SyncAssetChangesToQuote": true,
81     "UseType": "Main",
82     "ValidUntilDate": null,
83     "Id": "75723d17-937e-4213-89f8-41a8f2c81594",
84     "Name": "Tier_1",
85     "CreatedBy": {
86         "Id": "d717a075-9cbf-480c-
b230-837e0e6dee75",
87         "Name": "Test Manish User"
88     },
89     "CreatedDate": "2022-12-27T18:54:56",
90     "ModifiedBy": {
91         "Id": "d717a075-9cbf-480c-
b230-837e0e6dee75",
92         "Name": "Test Manish User"
93     },
94     "ModifiedDate": "2022-12-27T18:54:56",
95     "ExternalId": null,
96     "QuoteAuto_PickList_CstField_c": null,
97     "QuoteAuto_String_CstField_c": null,
98     "QuoteAuto_Double_CstField_c": null,
99     "QuoteAuto_Int_CstField_c": null,
100    "QuoteAuto_Boolean_CstField_c": null,
101    "QuoteAuto_Currency_CstField_c": null,
102    "QuoteAuto_DateTime_CstField_c": null,
103    "QuoteAuto_Multipicklist_CstField_c": null
104 },
105 {
106     "ABOType": "New",
107     "Account": {
108         "Id": "e60f1de6-6b54-4304-
a600-31c226b842db",
109         "Name": "AutoQuoteRLPAccount_"
110     },
111     "Amount": null,
112     "ApprovalStage": "Draft",
113     "AutoActivateOrder": false,
114     "AutoCreateBill": false,
115     "AutoCreateRevenue": false,
116     "BillingPreference": null,
117     "BillToAccount": null,
118     "ConfigurationEffectiveDate": null,

```

```
119     "ConfigurationFinalizedDate": null,  
120     "ConfigurationSyncDate": null,  
121     "Currency": "USD",  
122     "Description": "Tier 2 Quote",  
123     "DisableCartVersioning": false,  
124     "DiscountPercent": null,  
125     "ExpectedEndDate": null,  
126     "ExpectedStartDate": null,  
127     "GrandTotal": null,  
128     "Intent": null,  
129     "InternalDeadline": null,  
130     "IsAutoAccepted": false,  
131     "IsPrimary": true,  
132     "IsSystemGenerated": false,  
133     "IsTaskPending": false,  
134     "LegalEntity": null,  
135     "Location": {  
136         "Id": "7b363b21-2d8b-4277-  
b14e-0698ccd6bbd8",  
137         "Name": "Ahmedabad"  
138     },  
139     "NetAmount": null,  
140     "Opportunity": {  
141         "Id": "9129aa7e-2ad5-430f-  
b456-49d62eeaed87",  
142         "Name": "AutoQuoteRLPOpportunity"  
143     },  
144     "ParentProposal": null,  
145     "PartnerAccount": null,  
146     "ProposalPaymentTerm": "Net 30 Days",  
147     "PaymentTerm": null,  
148     "PODate": null,  
149     "PONumber": null,  
150     "PresentedDate": null,  
151     "PriceList": {  
152         "Id": "8bea2478-428c-4421-  
afcd-97e327dad477",  
153         "Name": "AutoQuoteRLP_QuotePL"  
154     },  
155     "PricingDate": null,  
156     "PrimaryContact": null,  
157     "ProposalApprovalDate": null,  
158     "ProposalCategory": "Quote",
```

```

159     "ProposalExpirationDate": null,
160     "ProposalName": null,
161     "PurchaseId": null,
162     "QTCProfile": null,
163     "ReadyForActivationDate": null,
164     "ReadyForBillingDate": null,
165     "ReadyForFulfillmentDate": null,
166     "ReadyForRevRecDate": null,
167     "ReadyToGenerate": true,
168     "ReadyToPresent": true,
169     "RelatedProposal": null,
170     "RFPIntakeDate": null,
171     "RFPResponseDueDate": null,
172     "RFPStage": null,
173     "RFPValue": null,
174     "RiskFactors": null,
175     "SalesTaxAmount": null,
176     "SalesTaxPercent": null,
177     "ShippingHandling": null,
178     "ShipToAccount": null,
179     "SingleTransactionAdjustment": false,
180     "SourceChannel": "Direct",
181     "SpecialTerms": null,
182     "StrategicImportance": null,
183     "SyncAssetChangesToQuote": true,
184     "UseType": "Main",
185     "ValidUntilDate": null,
186     "Id": "8cae6d8a-2a3b-4c1c-bf64-8ddef14dc863",
187     "Name": "Tier_2",
188     "CreatedBy": {
189         "Id": "d717a075-9cbf-480c-
b230-837e0e6dee75",
190         "Name": "Test Manish User"
191     },
192     "CreatedDate": "2022-12-27T20:04:29",
193     "ModifiedBy": {
194         "Id": "d717a075-9cbf-480c-
b230-837e0e6dee75",
195         "Name": "Test Manish User"
196     },
197     "ModifiedDate": "2022-12-27T20:04:29",
198     "ExternalId": null,
199     "QuoteAuto_PickList_CstField_c": null,
200     "QuoteAuto_String_CstField_c": null,

```

```

201     "QuoteAuto_Double_CstField_c": null,
202     "QuoteAuto_Int_CstField_c": null,
203     "QuoteAuto_Boolean_CstField_c": null,
204     "QuoteAuto_Currency_CstField_c": null,
205     "QuoteAuto_DateTime_CstField_c": null,
206     "QuoteAuto_Multipicklist_CstField_c": null
207   }
208 ]
    
```

Retrieving Quote Details (header information)

You can retrieve the details of a specific quote by passing the quote ID. The API returns the quote header fields, pricing, and quote line items among other details.

Prerequisite

You must gather the following details to create a quote.

- Quote ID

You can create a new quote and extract the quote ID from the response, create a quote using [POST/quotes](#) , or retrieve existing quotes using [GET/quotes](#) . For more information, see the "Creating a Quote" and "Retrieving List of Quotes" sections or see Quoting APIs.

Example

The following table lists the API method, endpoints, and sample codes for request and response, to retrieve the details of a quote:

Method	GET
Endpoint	/quotes/{quoteId}

<p>Request Parameters</p>	<p>The following URL parameter is used to pass the quote ID. You can use the value 'items' in the includes parameter to proposal line items associated with the given quote. For this example, only the ID of the quote is passed.</p> <table border="1" data-bbox="507 421 1425 629"> <thead> <tr> <th data-bbox="513 430 871 506">Parameters</th> <th data-bbox="877 430 1418 506">Values</th> </tr> </thead> <tbody> <tr> <td data-bbox="513 515 871 620">quoteID</td> <td data-bbox="877 515 1418 620">8cae6d8a-2a3b-4c1c-bf64-8ddef14dc863</td> </tr> </tbody> </table> <p>This quote was generated in the "Create a quote" section, using the <code>POST/quotes</code> API and its ID was retrieved using the <code>GET/quotes</code> API.</p>	Parameters	Values	quoteID	8cae6d8a-2a3b-4c1c-bf64-8ddef14dc863
Parameters	Values				
quoteID	8cae6d8a-2a3b-4c1c-bf64-8ddef14dc863				
<p>Request URL</p>	<p><code>https://<URL_of_the_Instance>/api/quote/v1/quotes/8cae6d8a-2a3b-4c1c-bf64-8ddef14dc863</code></p>				

Response	The API retrieves the structure of the quote.
	Response Body
	<pre>1 { 2 "ABOType": "New", 3 "Account": { 4 "Id": "e60f1de6-6b54-4304-a600-31c226b842db", 5 "Name": "AutoQuoteRLPAccount_" 6 }, 7 "Amount": null, 8 "ApprovalStage": "Draft", 9 "AutoActivateOrder": false, 10 "AutoCreateBill": false, 11 "AutoCreateRevenue": false, 12 "BillingPreference": null, 13 "BillToAccount": null, 14 "ConfigurationEffectiveDate": null, 15 "ConfigurationFinalizedDate": null, 16 "ConfigurationSyncDate": null, 17 "Currency": "USD", 18 "Description": "Tier 2 Quote", 19 "DisableCartVersioning": false, 20 "DiscountPercent": null, 21 "ExpectedEndDate": null, 22 "ExpectedStartDate": null, 23 "GrandTotal": null, 24 "Intent": null, 25 "InternalDeadline": null, 26 "IsAutoAccepted": false, 27 "IsPrimary": true, 28 "IsSystemGenerated": false, 29 "IsTaskPending": false, 30 "LegalEntity": null, 31 "Location": { 32 "Id": "7b363b21-2d8b-4277-b14e-0698ccd6bbd8", 33 "Name": "Ahmedabad" 34 }, 35 "NetAmount": null, 36 "Opportunity": { 37 "Id": "9129aa7e-2ad5-430f-b456-49d62eeaed87", 38 "Name": "AutoQuoteRLPOpportunity"</pre>


```
39 },
40 "ParentProposal": null,
41 "PartnerAccount": null,
42 "ProposalPaymentTerm": "Net 30 Days",
43 "PaymentTerm": null,
44 "PODate": null,
45 "PONumber": null,
46 "PresentedDate": null,
47 "PriceList": {
48   "Id": "8bea2478-428c-4421-afcd-97e327dad477",
49   "Name": "AutoQuoteRLP_QuotePL"
50 },
51 "PricingDate": null,
52 "PrimaryContact": null,
53 "ProposalApprovalDate": null,
54 "ProposalCategory": "Quote",
55 "ProposalExpirationDate": null,
56 "ProposalName": null,
57 "PurchaseId": null,
58 "QTCProfile": null,
59 "ReadyForActivationDate": null,
60 "ReadyForBillingDate": null,
61 "ReadyForFulfillmentDate": null,
62 "ReadyForRevRecDate": null,
63 "ReadyToGenerate": true,
64 "ReadyToPresent": true,
65 "RelatedProposal": null,
66 "RFPIntakeDate": null,
67 "RFPResponseDueDate": null,
68 "RFPStage": null,
69 "RFPValue": null,
70 "RiskFactors": null,
71 "SalesTaxAmount": null,
72 "SalesTaxPercent": null,
73 "ShippingHandling": null,
74 "ShipToAccount": null,
75 "SingleTransactionAdjustment": false,
76 "SourceChannel": "Direct",
77 "SpecialTerms": null,
78 "StrategicImportance": null,
79 "SyncAssetChangesToQuote": true,
80 "UseType": "Main",
81 "ValidUntilDate": null,
82 "Id": "8cae6d8a-2a3b-4c1c-bf64-8ddef14dc863",
```

```

83     "Name": "Tier_2",
84     "CreatedBy": {
85         "Id": "d717a075-9cbf-480c-b230-837e0e6dee75",
86         "Name": "Test Manish User"
87     },
88     "CreatedDate": "2022-12-27T20:04:29",
89     "ModifiedBy": {
90         "Id": "d717a075-9cbf-480c-b230-837e0e6dee75",
91         "Name": "Test Manish User"
92     },
93     "ModifiedDate": "2022-12-27T20:04:29",
94     "ExternalId": null,
95     "QuoteAuto_PickList_CstField_c": null,
96     "QuoteAuto_String_CstField_c": null,
97     "QuoteAuto_Double_CstField_c": null,
98     "QuoteAuto_Int_CstField_c": null,
99     "QuoteAuto_Boolean_CstField_c": null,
100    "QuoteAuto_Currency_CstField_c": null,
101    "QuoteAuto_DateTime_CstField_c": null,
102    "QuoteAuto_Multipicklist_CstField_c": null
103 }

```

Editing Quote

You can update one or more quotes by passing the updates in the request body. You can update the quote header field details of any quote that is not in the accepted state.

Prerequisite

You must gather the following details to create a quote.

- Quote ID
- Quote object details

You can retrieve existing quotes using the `GET/quotes` API and extract quote ID from the response. In case you have Quote ID, you can also extract the quote object details using the `GET/quotes/{quoteId}` API. For more information, see the "Retrieving List of Quotes" or "Retrieving Quote Details (header information)" sections or see Quoting APIs.

Example 1

The following table lists the API method, endpoints, and sample codes for requests and responses, to update quotes:

Method	PATCH
Endpoint	/quotes
Request URL	<code>https://<URL_of_the_Instance>/api/quote/v1/quotes</code>
Request Body	<p>The below sample code updates the pricelist associated with the quotes with the following IDs, which were generated in the section Creating quotes.</p> <ul style="list-style-type: none"> 75723d17-937e-4213-89f8-41a8f2c81594 8cae6d8a-2a3b-4c1c-bf64-8ddef14dc863 <pre> 1 [2 { 3 "Id": 4 "75723d17-937e-4213-89f8-41a8f2c81594", 5 "PriceList": { 6 "Id": 7 "b01c1010-9381-4335-88a5-8323378b86a0", 8 "Name": "Auto_Inc0to0PromptELevel2_PL001" 9 } 10 }, 11 { 12 "Id": "8cae6d8a-2a3b-4c1c- 13 bf64-8ddef14dc863", 14 "PriceList": { 15 "Id": 16 "b01c1010-9381-4335-88a5-8323378b86a0", 17 "Name": "Auto_Inc0to0PromptELevel2_PL001" 18 } 19 } 20] </pre>

Response	The API returns the structure of the updated quotes.
	<p style="text-align: center;">Response Body</p>
	<pre> 1 [2 { 3 "ABOType": "New", 4 "Account": { 5 "Id": "e60f1de6-6b54-4304-a600-31c226b842db", 6 "Name": "AutoQuoteRLPAccount_" 7 }, 8 "Amount": null, 9 "ApprovalStage": "Draft", 10 "AutoActivateOrder": false, 11 "AutoCreateBill": false, 12 "AutoCreateRevenue": false, 13 "BillingPreference": null, 14 "BillToAccount": null, 15 "ConfigurationEffectiveDate": null, 16 "ConfigurationFinalizedDate": null, 17 "ConfigurationSyncDate": null, 18 "Currency": "USD", 19 "Description": 20 "AutoQuoteService_Description1667823791262_57", 21 "DisableCartVersioning": false, 22 "DiscountPercent": null, 23 "ExpectedEndDate": null, 24 "ExpectedStartDate": null, 25 "GrandTotal": null, 26 "Intent": null, 27 "InternalDeadline": null, 28 "IsAutoAccepted": false, 29 "IsPrimary": true, 30 "IsSystemGenerated": false, 31 "IsTaskPending": false, 32 "LegalEntity": null, 33 "Location": { 34 "Id": "7b363b21-2d8b-4277-b14e-0698ccd6bbd8", 35 "Name": "Ahmedabad" 36 }, 37 "NetAmount": null, 38 "Opportunity": { </pre>

```
38     "Id": "9129aa7e-2ad5-430f-b456-49d62eeeaed87",
39     "Name": "AutoQuoteRLOpportunity"
40 },
41 "ParentProposal": null,
42 "PartnerAccount": null,
43 "ProposalPaymentTerm": "Net 30 Days",
44 "PaymentTerm": null,
45 "PODate": null,
46 "PONumber": null,
47 "PresentedDate": null,
48 "PriceList": {
49     "Id": "b01c1010-9381-4335-88a5-8323378b86a0",
50     "Name": "Auto_Inc0to0PromptELevel2_PL001"
51 },
52 "PricingDate": null,
53 "PrimaryContact": null,
54 "ProposalApprovalDate": null,
55 "ProposalCategory": "Quote",
56 "ProposalExpirationDate": null,
57 "ProposalName": null,
58 "PurchaseId": null,
59 "QTCProfile": null,
60 "ReadyForActivationDate": null,
61 "ReadyForBillingDate": null,
62 "ReadyForFulfillmentDate": null,
63 "ReadyForRevRecDate": null,
64 "ReadyToGenerate": true,
65 "ReadyToPresent": true,
66 "RelatedProposal": null,
67 "RFPIntakeDate": null,
68 "RFPPromiseDueDate": null,
69 "RFPPromise": null,
70 "RFPPromise": null,
71 "RiskFactors": null,
72 "SalesTaxAmount": null,
73 "SalesTaxPercent": null,
74 "ShippingHandling": null,
75 "ShipToAccount": null,
76 "SingleTransactionAdjustment": false,
77 "SourceChannel": "Direct",
78 "SpecialTerms": null,
79 "StrategicImportance": null,
80 "SyncAssetChangesToQuote": true,
81 "UseType": "Main",
```

```

82     "ValidUntilDate": null,
83     "Id": "75723d17-937e-4213-89f8-41a8f2c81594",
84     "Name": "Tier_1",
85     "CreatedBy": {
86         "Id": "d717a075-9cbf-480c-b230-837e0e6dee75",
87         "Name": "Test Manish User"
88     },
89     "CreatedDate": "2022-12-27T18:54:56",
90     "ModifiedBy": {
91         "Id": "d717a075-9cbf-480c-b230-837e0e6dee75",
92         "Name": "Test Manish User"
93     },
94     "ModifiedDate": "2022-12-27T21:33:46.3875832",
95     "ExternalId": null,
96     "QuoteAuto_PickList_CstField_c": null,
97     "QuoteAuto_String_CstField_c": null,
98     "QuoteAuto_Double_CstField_c": null,
99     "QuoteAuto_Int_CstField_c": null,
100    "QuoteAuto_Boolean_CstField_c": null,
101    "QuoteAuto_Currency_CstField_c": null,
102    "QuoteAuto_DateTime_CstField_c": null,
103    "QuoteAuto_Multipicklist_CstField_c": null
104 },
105 {
106     "ABOType": "New",
107     "Account": {
108         "Id": "e60f1de6-6b54-4304-a600-31c226b842db",
109         "Name": "AutoQuoteRLPAccount_"
110     },
111     "Amount": null,
112     "ApprovalStage": "Draft",
113     "AutoActivateOrder": false,
114     "AutoCreateBill": false,
115     "AutoCreateRevenue": false,
116     "BillingPreference": null,
117     "BillToAccount": null,
118     "ConfigurationEffectiveDate": null,
119     "ConfigurationFinalizedDate": null,
120     "ConfigurationSyncDate": null,
121     "Currency": "USD",
122     "Description": "Tier 2 Quote",
123     "DisableCartVersioning": false,
124     "DiscountPercent": null,

```

```
125     "ExpectedEndDate": null,  
126     "ExpectedStartDate": null,  
127     "GrandTotal": null,  
128     "Intent": null,  
129     "InternalDeadline": null,  
130     "IsAutoAccepted": false,  
131     "IsPrimary": true,  
132     "IsSystemGenerated": false,  
133     "IsTaskPending": false,  
134     "LegalEntity": null,  
135     "Location": {  
136         "Id": "7b363b21-2d8b-4277-b14e-0698cccd6bbd8",  
137         "Name": "Ahmedabad"  
138     },  
139     "NetAmount": null,  
140     "Opportunity": {  
141         "Id": "9129aa7e-2ad5-430f-b456-49d62eeaed87",  
142         "Name": "AutoQuoteRLOpportunity"  
143     },  
144     "ParentProposal": null,  
145     "PartnerAccount": null,  
146     "ProposalPaymentTerm": "Net 30 Days",  
147     "PaymentTerm": null,  
148     "PODate": null,  
149     "PONumber": null,  
150     "PresentedDate": null,  
151     "PriceList": {  
152         "Id": "b01c1010-9381-4335-88a5-8323378b86a0",  
153         "Name": "Auto_Inc0to0PromptELevel2_PL001"  
154     },  
155     "PricingDate": null,  
156     "PrimaryContact": null,  
157     "ProposalApprovalDate": null,  
158     "ProposalCategory": "Quote",  
159     "ProposalExpirationDate": null,  
160     "ProposalName": null,  
161     "PurchaseId": null,  
162     "QTCProfile": null,  
163     "ReadyForActivationDate": null,  
164     "ReadyForBillingDate": null,  
165     "ReadyForFulfillmentDate": null,  
166     "ReadyForRevRecDate": null,  
167     "ReadyToGenerate": true,  
168     "ReadyToPresent": true,
```

```
169     "RelatedProposal": null,  
170     "RFPIntakeDate": null,  
171     "RFPResponseDueDate": null,  
172     "RFPStage": null,  
173     "RFPValue": null,  
174     "RiskFactors": null,  
175     "SalesTaxAmount": null,  
176     "SalesTaxPercent": null,  
177     "ShippingHandling": null,  
178     "ShipToAccount": null,  
179     "SingleTransactionAdjustment": false,  
180     "SourceChannel": "Direct",  
181     "SpecialTerms": null,  
182     "StrategicImportance": null,  
183     "SyncAssetChangesToQuote": true,  
184     "UseType": "Main",  
185     "ValidUntilDate": null,  
186     "Id": "8cae6d8a-2a3b-4c1c-bf64-8ddef14dc863",  
187     "Name": "Tier_2",  
188     "CreatedBy": {  
189         "Id": "d717a075-9cbf-480c-b230-837e0e6dee75",  
190         "Name": "Test Manish User"  
191     },  
192     "CreatedDate": "2022-12-27T20:04:29",  
193     "ModifiedBy": {  
194         "Id": "d717a075-9cbf-480c-b230-837e0e6dee75",  
195         "Name": "Test Manish User"  
196     },  
197     "ModifiedDate": "2022-12-27T21:33:46.3867949",  
198     "ExternalId": null,  
199     "QuoteAuto_PickList_CstField_c": null,  
200     "QuoteAuto_String_CstField_c": null,  
201     "QuoteAuto_Double_CstField_c": null,  
202     "QuoteAuto_Int_CstField_c": null,  
203     "QuoteAuto_Boolean_CstField_c": null,  
204     "QuoteAuto_Currency_CstField_c": null,  
205     "QuoteAuto_DateTime_CstField_c": null,  
206     "QuoteAuto_Multipicklist_CstField_c": null  
207 }  
208 ]
```


Example 2

The following table list the API method, endpoints, and sample codes for requests and responses, to update a specific quote:

Method	PATCH					
Endpoint	quotes/{quoteId}					
Request Parameter	<p>The following URL parameter is used to pass the quote ID. This quote was generated previously using the POST/quotes API and its ID was retrieved using the GET/quotes API.</p> <table border="1"> <thead> <tr> <th>Parameters</th> <th>Values</th> </tr> </thead> <tbody> <tr> <td>quoteId</td> <td>75723d17-937e-4213-89f8-41a8f2c81594</td> </tr> </tbody> </table>		Parameters	Values	quoteId	75723d17-937e-4213-89f8-41a8f2c81594
Parameters	Values					
quoteId	75723d17-937e-4213-89f8-41a8f2c81594					
Request URL	<a href="https://<URL_of_the_Instance>/api/quote/v1/quotes/75723d17-937e-4213-89f8-41a8f2c81594">https://<URL_of_the_Instance>/api/quote/v1/quotes/75723d17-937e-4213-89f8-41a8f2c81594					

Request Body

The below sample code updates the **Billing To Account** field associated with the quote named *Tier_1* with

75723d17-937e-4213-89f8-41a8f2c81594 ID, which was generated in the section Creating Quotes. To update a single quote, you must pass the entire object with updated fields where required.

In this example, **Billing To Account** field is changed from null to the following values:

```

1  "BillToAccount":
2    {
3      "Id": "e60f1de6-6b54-4304-
4      a600-31c226b842db",
5      "Name": "AutoQuoteRLPAccount_"
    }

```

Request Body

```

1  {
2    "ABOType": "New",
3    "Account": {
4      "Id": "e60f1de6-6b54-4304-a600-31c226b842db",
5      "Name": "AutoQuoteRLPAccount_"
6    },
7    "Amount": null,
8    "ApprovalStage": "Draft",
9    "AutoActivateOrder": false,
10   "AutoCreateBill": false,
11   "AutoCreateRevenue": false,
12   "BillingPreference": null,
13   "BillToAccount": {
14     "Id": "e60f1de6-6b54-4304-a600-31c226b842db",
15     "Name": "AutoQuoteRLPAccount_"
16   },
17   "ConfigurationEffectiveDate": null,
18   "ConfigurationFinalizedDate": null,
19   "ConfigurationSyncDate": null,
20   "Currency": "USD",
21   "Description":
22   "AutoQuoteService_Description1667823791262_57",
    "DisableCartVersioning": false,

```

```
23 "DiscountPercent": null,  
24 "ExpectedEndDate": null,  
25 "ExpectedStartDate": null,  
26 "GrandTotal": null,  
27 "Intent": null,  
28 "InternalDeadline": null,  
29 "IsAutoAccepted": false,  
30 "IsPrimary": true,  
31 "IsSystemGenerated": false,  
32 "IsTaskPending": false,  
33 "LegalEntity": null,  
34 "Location": {  
35   "Id": "7b363b21-2d8b-4277-b14e-0698ccd6bbd8",  
36   "Name": "Ahmedabad"  
37 },  
38 "NetAmount": null,  
39 "Opportunity": {  
40   "Id": "9129aa7e-2ad5-430f-b456-49d62eeaed87",  
41   "Name": "AutoQuoteRLPOpportunity"  
42 },  
43 "ParentProposal": null,  
44 "PartnerAccount": null,  
45 "ProposalPaymentTerm": "Net 30 Days",  
46 "PaymentTerm": null,  
47 "PODate": null,  
48 "PONumber": null,  
49 "PresentedDate": null,  
50 "PriceList": {  
51   "Id": "b01c1010-9381-4335-88a5-8323378b86a0",  
52   "Name": "Auto_Inc0toOPromptELevel2_PL001"  
53 },  
54 "PricingDate": null,  
55 "PrimaryContact": null,  
56 "ProposalApprovalDate": null,  
57 "ProposalCategory": "Quote",  
58 "ProposalExpirationDate": null,  
59 "ProposalName": null,  
60 "PurchaseId": null,  
61 "QTCProfile": null,  
62 "ReadyForActivationDate": null,  
63 "ReadyForBillingDate": null,  
64 "ReadyForFulfillmentDate": null,  
65 "ReadyForRevRecDate": null,  
66 "ReadyToGenerate": true,
```

	<pre> 67 "ReadyToPresent": true, 68 "RelatedProposal": null, 69 "RFPIntakeDate": null, 70 "RFPResponseDueDate": null, 71 "RFPStage": null, 72 "RFPValue": null, 73 "RiskFactors": null, 74 "SalesTaxAmount": null, 75 "SalesTaxPercent": null, 76 "ShippingHandling": null, 77 "ShipToAccount": null, 78 "SingleTransactionAdjustment": false, 79 "SourceChannel": "Direct", 80 "SpecialTerms": null, 81 "StrategicImportance": null, 82 "SyncAssetChangesToQuote": true, 83 "UseType": "Main", 84 "ValidUntilDate": null, 85 "Id": "75723d17-937e-4213-89f8-41a8f2c81594", 86 "Name": "Tier_1", 87 "CreatedBy": { 88 "Id": "d717a075-9cbf-480c-b230-837e0e6dee75", 89 "Name": "Test Manish User" 90 }, 91 "CreatedDate": "2022-12-27T18:54:56", 92 "ModifiedBy": { 93 "Id": "d717a075-9cbf-480c-b230-837e0e6dee75", 94 "Name": "Test Manish User" 95 }, 96 "ModifiedDate": "2022-12-28T07:31:08", 97 "ExternalId": null, 98 "QuoteAuto_PickList_CstField_c": null, 99 "QuoteAuto_String_CstField_c": null, 100 "QuoteAuto_Double_CstField_c": null, 101 "QuoteAuto_Int_CstField_c": null, 102 "QuoteAuto_Boolean_CstField_c": null, 103 "QuoteAuto_Currency_CstField_c": null, 104 "QuoteAuto_DateTime_CstField_c": null, 105 "QuoteAuto_Multipicklist_CstField_c": null 106 } </pre>
Response	The API returns the updated quote object.

Working with Order APIs

This use case describes how to work with the orders created for a customer before delivering the goods or services.

Sales and customer representatives can use *Order APIs* in the following scenarios.


Scenario	API
To view the list of already created orders	<code>GET/orders</code>
To view a specific order	<code>GET/orders/{orderId}</code>
To update an order	<code>PATCH/orders/{orderId}</code>
To confirm an order	<code>POST/orders/{orderId}/confirm</code>
To cancel an order	<code>POST/orders/{orderId}/cancel</code>

This section describes the following use case:

- [Updating Order Details](#)

Updating Order Details

A customer has created an order through a quote using CPQ APIs. By default, the status of the order is 'Created'. Later, for any reason, the customer decided to update the order. Sales or customer representatives can update an order based on new requirements from the customer. Once the order is created, you can only edit or update the order header details (except the order status).

 You cannot update header fields after confirming the order.

The *Update an order* API allows you to modify the following header fields:

- Account
 - Bill To
 - Ship To
- Primary Contact

To update the order successfully, you must invoke the order APIs in the following order.

i You can directly run this API if you know the order id for which the header details are to be updated.

Prerequisite:

You must gather the following to update the order.

- Order ID
- Order Name

You can use the `GET/orders` API to retrieve all orders in the system. For more information, see Order APIs.

Example 1

The following table lists the API method, endpoints, and sample codes for fetching order details.

Method	GET
Endpoint	/orders
Request URL	<code>https://<URL_of_the_Instance>/api/order/v1/orders/{orderId}</code>
Request	<p>The following sample code fetches the order.</p> <pre style="border: 1px solid #ccc; border-radius: 10px; padding: 10px; margin-top: 10px;">"https://rlp-dev.congacloud.io/api/order/v1/orders/<order id>"</pre>

<p>Response</p>	<p>This API returns the structure of the order details of the <i>order id</i> passed in the request body.</p> <p>Response Body:</p> <pre> { "ActivatedDate": null, "AmendmentEffectiveDate": null, "AutoActivateOrder": false, "BillingPreference": null, "BillToAccount": { "Id": "<id of the billing account>", "Name": "<name of the bill to account>" }, "CancelledDate": null, "CompletedDate": null, "ConfigurationEffectiveDate": null, "ConfigurationSyncDate": null, "Description": "RLPOrder Description", "FulfilledDate": null, "LegalEntity": null, "Location": null, "NextVersion": null, "OrderAmount": null, "OrderDate": null, "OrderEndDate": null, "OrderReferenceNumber": null, "OrderStartDate": null, "OriginalOrderNumber": null, "ParentOrder": null, "PartnerAccount": null, "PaymentStatus": null, "PaymentTerm": null, "PODate": null, "PONumber": null, "PreviousVersion": null, "PriceList": { "Id": "e7244530-40fc-4926-a78a-fd4d2c6df962", "Name": "AutoQuoteRLP_QuotePL" }, "PricingDate": null, "PrimaryContact": { "Id": "f2b5232a-deb3-4cd0-a49c-4ac2d50f1e08", </pre>
------------------------	---

```

    "Name": "AutoQuoteRLP_PrimaryContact1"
  },
  "Proposal": {
    "Id": "4cf93b4b-5224-40f9-b0ac-7ca5b63118ce",
    "Name": "AutoQuoteService_Name-736431291667818708925_855"
  },
  "PurchaseId": null,
  "PurchaseOrder": null,
  "ReadyForBillingDate": null,
  "ReadyForRevRecDate": null,
  "ReadyForWorkflow": false,
  "RelatedOpportunity": null,
  "ShipToAccount": {
    "Id": "25c6d8a5-12c7-4970-ac96-87335ea888f1",
    "Name": "AutoQuoteShipToRLPAccount_"
  },
  "SingleTransactionAdjustment": false,
  "SoldToAccount": {
    "Id": "ae80f382-0356-48df-80cf-dd22b550ee81",
    "Name": "AutoQuoteSoldToRLPAccount_"
  },
  "Source": "Account",
  "SourceChannel": "Direct",
  "Status": "Generated",
  "Type": "New",
  "Currency": "USD",
  "Id": "ffea69f1-a4af-4467-afda-eb56185f9034",
  "Name": "RLPOrder Name-157736110",
  "CreatedBy": {
    "Id": "27634e3f-904a-4321-9ce5-c2edbe181d90",
    "Name": "Test User"
  },
  "CreatedDate": "2022-11-07T10:57:54",
  "ModifiedBy": {
    "Id": "11111111-1111-1111-1111-111111111111",
    "Name": "System Admin"
  },
  "ModifiedDate": "2022-11-21T13:59:37",
  "ExternalId": null,
  "QuoteAuto_Boolean_CstField_c": true,
  "QuoteAuto_PickList_CstField_c": "INR",
  "QuoteAuto_Int_CstField_c": 150,

```



```

"QuoteAuto_Double_CstField_c": 77.89,
"QuoteAuto_String_CstField_c": "Order_Service",
"QuoteAuto_DateTime_CstField_c": "2020-07-18T00:00:00",
"QuoteAuto_Multipicklist_CstField_c": [
  "Red",
  "Blue"
],
"QuoteAuto_Currency_CstField_c": null
}

```

Example 2

The following table lists the API method, endpoints, and sample codes for request and response, to update the order.

Method	PATCH
Endpoint	/orders
Request URL	<code>https://<URL_of_the_Instance>/api/order/v1/orders/id</code>
Request	<p>The following sample code updates the description and shipTo account in the order 3.</p> <pre> { "AutoActivateOrder": false, "ReadyForWorkflow": false, "ShipToAccount": { "Id": "25c6d8a5-12c7-4970-ac96-87335ea888f1", "Name": "AutoQuoteShipToRLPAccount_" }, "SingleTransactionAdjustment": false, "Source": "Account", "SourceChannel": "Direct", "Status": "Pending", "Type": "New", "Name": "Order3", "Description": "This is a sample order" } </pre>

Response	<p>This API returns the structure of the order details, which includes the updated primary contact based on the request body.</p> <p>Response Body:</p> <pre>{ "Name": "Order3", "Id": "f35934bc-b04b-4fe8-990a-5676c7615f2a", "CreatedBy": { "Id": "ddfec712-8827-4684-8287-1373e4f1f43d", "Name": "Conga User" }, "CreateDate": "2022-07-18T16:23:07", "ModifiedBy": { "Id": "ddfec712-8827-4684-8287-1373e4f1f43d", "Name": "Conga User" }, "ModifiedDate": "2022-07-21T09:03:36", "ExternalId": null, "ActivatedDate": "2022-07-18T16:23:07", "AmendmentEffectiveDate": null, "AutoActivateOrder": false, "BillingPreference": null, "BillToAccount": { "Id": "dcb42e39-15c2-4895-aa35-53ee6c140d78", "Name": "Conga" }, "CancelledDate": null, "CompletedDate": null, "ConfigurationEffectiveDate": null, "ConfigurationSyncDate": null, "Description": "Test DC Order", "FulfilledDate": null, "LegalEntity": null, "Location": null, "NextVersion": null, "OrderAmount": { "Value": 100, "DisplayValue": 100, "CurrencyCode": "USD", "CurrencySymbol": "\$" }, }</pre>
-----------------	---

```

"OrderDate": null,
"OrderEndDate": null,
"OrderReferenceNumber": null,
"OrderStartDate": null,
"OriginalOrderNumber": null,
"ParentOrder": null,
"PartnerAccount": null,
"PaymentStatus": "Pending",
"PaymentTerm": null,
"PODate": null,
"PONumber": null,
"PreviousVersion": null,
"PriceList": {
  "Id": "32c3519a-f190-4f38-b05a-8063ef611492",
  "Name": "Test Price List - 7"
},
"PricingDate": null,
"PrimaryContact": {
  "Id": "ddfec712-8827-4684-8287-1373e4f1f43d",
  "Name": "Conga"
},
"ProposalId": null,
"PurchaseId": null,
"PurchaseOrder": null,
"ReadyForBillingDate": null,
"ReadyForRevRecDate": null,
"ReadyForWorkflow": false,
"RelatedOpportunity": null,
"ShipToAccount": {
  "Id": "dcb42e39-15c2-4895-aa35-53ee6c140d78",
  "Name": "Conga"
},
"SingleTransactionAdjustment": false,
"SoldToAccount": {
  "Id": "dcb42e39-15c2-4895-aa35-53ee6c140d78",
  "Name": "Conga"
},
"Source": "Account",
"SourceChannel": "Direct",
>Status": "Draft",
>Type": "New",
>Currency": "USD"
}

```

Example 3

The following table lists the API method, endpoints, and sample codes for request and response, to update the order description and ShipTo details for an order 3.

Method	PATCH
Endpoint	/orders
Request URL	<code>https://<URL_of_the_Instance>/api/order/v1/orders/orderid</code>
Request	<p>The following sample code updates the primary contact that is associated with order3.</p> <pre>{ "AutoActivateOrder": false, "PrimaryContact": { "Id": "<A unique ID of the primary contact>", "Name": "<Name of the primary contact>" }, }</pre>

<p>Response</p>	<p>This API returns the structure of the order details, which includes the updated description and ShipTo details based on the request body.</p> <p>Response Body:</p> <pre> { "ActivatedDate": "2022-07-18T16:23:07", "AmendmentEffectiveDate": null, "AutoActivateOrder": false, "BillingPreference": null, "BillToAccount": { "Id": "dcb42e39-15c2-4895-aa35-53ee6c140d78", "Name": "Conga" }, "CancelledDate": null, "CompletedDate": null, "ConfigurationEffectiveDate": null, "ConfigurationSyncDate": null, "Description": "This is a sample order", //Updated order description "FulfilledDate": null, "LegalEntity": null, "Location": null, "NextVersion": null, "OrderAmount": { "Value": 100, "DisplayValue": 100, "CurrencyCode": "USD", "CurrencySymbol": "\$" }, "OrderDate": null, "OrderEndDate": null, "OrderReferenceNumber": null, "OrderStartDate": null, "OriginalOrderNumber": null, "ParentOrder": null, "PartnerAccount": null, "PaymentStatus": "Pending", "PaymentTerm": null, "PODate": null, "PONumber": null, "PreviousVersion": null, "PriceList": { </pre>
------------------------	--

```

    "Id": "32c3519a-f190-4f38-b05a-8063ef611492",
    "Name": "Test Price List - 7"
  },
  "PricingDate": null,
  "PrimaryContact": {
    "Id": "ddfec712-8827-4684-8287-1373e4f1f43d",
    "Name": "Conga"
  },
  "Proposal": null,
  "PurchaseId": null,
  "PurchaseOrder": null,
  "ReadyForBillingDate": null,
  "ReadyForRevRecDate": null,
  "ReadyForWorkflow": false,
  "RelatedOpportunity": null,
  "ShipToAccount": {
    "Id": "25c6d8a5-12c7-4970-ac96-87335ea888f1", //Updated
    "Name": "AutoQuoteShipToRLPAccount_"
  },
  "SingleTransactionAdjustment": false,
  "SoldToAccount": {
    "Id": "dcb42e39-15c2-4895-aa35-53ee6c140d78",
    "Name": "Conga"
  },
  "Source": "Account",
  "SourceChannel": "Direct",
  "Status": "Pending",
  "Type": "New",
  "Currency": "USD",
  "Id": "f35934bc-b04b-4fe8-990a-5676c7615f2a",
  "Name": "Order3",
  "CreatedBy": {
    "Id": "ddfec712-8827-4684-8287-1373e4f1f43d",
    "Name": "Conga User"
  },
  "CreatedDate": "2022-07-18T16:23:07",
  "ModifiedBy": {
    "Id": "d717a075-9cbf-480c-b230-837e0e6dee75",
    "Name": "Test User"
  },
  "ModifiedDate": "2023-02-07T06:38:18.6814916",

```

```
"ExternalId": null,  
"ProposalId": null  
}
```

CPQ Features by Release

Review the latest CPQ Features by Release document.

- [Features by Release](#)

Features by Release

This document contains an overview of features introduced in each major release of Conga CPQ. For more information, see Conga CPQ Features by Release.

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