Conga Digital Commerce

202408.3.0 Preview Release

Get early access to the latest features and improvements.

Table of Contents

Request quotes or place orders through a single digital commerce platform, providing a unified and modern buying and selling experience.

Digital Commerce Release Notes

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

202408.3.0 Release Notes

In these release notes, you can find new features and enhancements and fixed and known issues for the Digital Commerce 202408.3.0 release. For documentation updates, see What's New in Digital Commerce 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 Digital Commerce in this release.

Replacement Rule for Bundle Products

You can now apply replacement constraint rules to bundle product configurations for both option matches and primary line matches, displaying prompts or messages based on bundle option selections.

For more information, see Working with Replacement Rule.

Reselecting Options in ABO Amend

You can now reselect options during an ABO Amend action after deselecting them. Previously, the application prevented this, but it now allows configuration adjustments.

Fixed Issues

There are no fixed issues in this release.

Known Issues

There are no known issues in this release.

DOC ID: DCRLP202408.3.0RN20240916

About Conga Digital Commerce

Present and place orders through a single digital commerce platform, providing a unified and modern buying and selling experience. Digital Commerce is the activity of electronically buying or selling products on online services or over the Internet. Digital Commerce can be used as a standalone web app or a mobile application. It can also be used to conduct social commerce. It enables consumers to shop from their homes and offices, and even on the move.

Conga CPQ is a CRM-agnostic solution available on the Conga Platform. With an API-first approach, CPQ services (configuration, pricing, quoting) can be embedded into customers' 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.

As an administrator, you can use the Conga CPQ application and APIs to perform configuration and pricing tasks to build the catalog page for your e-commerce website. Configuration involves creating products, options, attributes, and categories and associating them appropriately with each other for visibility on the Catalog page. A product can be created as a standalone product or as a bundle product with options and attributes. You can control the selection of a product on the catalog page by configuring constraint rules. You can also control the selection of attributes on the configuration page of a product by setting up an attribute-based configuration for that product. Pricing enables you to set up pricing structures for the products so that the price for all products is calculated accurately. Pricing has two components: Price Lists and Price List Items. A price list controls the visibility of products to the user. A price list contains several price list items, each linked to a product. Conga CPQ calculates the price for each product based on the applied price list, price list items, and various pricing and discounting rules.

After you have used Conga CPQ to configure products and pricing, you can associate the price list to the storefront object within the Digital Commerce package. After your catalog has been set up, the next step is to create a Storefront record. The storefront object is very basic and requires only two fields to map a storefront to a price list and an active account. The price list refers to the price list you want the user to access.

Key Terminology

It is important to understand how terms are used when working with Digital Commerce.

Term	Description
Configure Price Quote (CPQ)	Conga solution for configuring products, setting up pricing, and generating quotes.
Partner Commerce	Partner Commerce enables your partner company to create quotes, configure products, and manage orders for the end customer to ensure faster selling and up-time without your support.
Product Catalog	A view that allows hierarchical categorization of products for users to search through and add to their configuration.
Products	Products or services that can be sold on its own as a standalone item, an option of other products, or as part of a bundled product.
Constraint Rules	Rules that drive automatic inclusion, exclusion, recommendation, or replacement of products selected on the catalog page. Each Constraint Rule is composed of three parts: the Rule Detail, the Rule Condition, and the Rule Actions.
Options	A product that can be sold along with another product.
Attributes	Features of a product, such as color, size, weight, and more.
Storefront	A custom object that is part of the E-Commerce package. The storefront object maps a storefront to a price list and other basic information such as logos, banners, and more.
Reference template/application	Base template provided by Conga for further development and customization as per your requirement.

Term	Description
Translations	If your org has multiple languages enabled, use Translation Workbench to maintain your translated labels in your org. You can manage translated values for any Salesforce supported language.
Quote	A structured definition of a prospective sale that contains product configurations, pricing, and customer opportunity information.

What's New in Digital Commerce Documentation

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

202408.3.0

Document	Publication Date	Topic	Description
202408.3.0		Working with Replacement Rule	Added supported product types as Bundle and Options in the Replacement Rule topic.
		SDK Reference	Updated for 202408.3.0 release
		Installing the Reference Template	Updated the SDK packages and reference templates information.

202408.2.0

Document	Publication Date	Topic	Description
202408.2.0		Managing Favorite	Added Updating Existing Favorite and Adding New Favorite information in the topic.
		Saving Products and Cart Configuration as Favorite	New topic with the updated favorites information.
		Adding New Favorite	New topic

Document	Publication Date	Topic	Description
		Updating an Existing Favorite	New topic
		Working with Favorites	New topic created with the updated favorites information.
		SDK Reference	Updated for 202408.2.0 release
		Installing the Reference Template	Updated the SDK packages and reference templates information.

202408.1.0

Document	Publication Date	Topic	Description
202408.1.0		Product Configuration	Added Replacement Rule information in the topic.
		SDK Reference	Updated for 202408.1.0 release
		Installing the Reference Template	Updated the SDK packages and reference templates information.

202407.2.0

Document	Publication Date	Topic	Description
202407.2.0		Using CTA (call-to-action) "Quick-Add" button	Updated the topic with Quick-Add button icon and related screens.
		Browsing Catalog	Updated the topic with Quick-Add button icon and related screens.
		Searching for Products	Updated the topic with Quick-Add button icon and related screens.
		Comparing Products	Updated the topic with Quick-Add button icon and related screens.
		Adding Products to a Cart	Updated the topic with Quick-Add button icon and related screens.
		Product Configuration	Updated the topic with Quick-Add button icon and related screens.
		Revalidating the Product Configuration	Updated the topic with Quick-Add button icon and related screens.
		Managing the Cart	Updated the topic with Quick-Add button icon and related screens.
		Cloning Primary Line Items	Updated the topic with Quick-Add button icon and related screens.
		Managing Favorites	Updated the topic with Quick-Add button icon and related screens.

Document	Publication Date	Topic	Description
		Managing Quotes	Updated the topic with Quick-Add button icon and related screens.
		Managing Assets	Updated the topic with Quick-Add button icon and related screens.
		SDK Reference	Updated for 202407.2.0 release.
		Installing the Reference Template	Added the important note for GitHub release registries to get the latest SDK packages and reference templates.

202407.1.0

Document	Publication Date	Topic	Description
202407.1.0	NA	NA	NA

202406.2.0

Document	Publication Date	Topic	Description
202406.2.0		Setting Up Multi-Language Support	Updated the topic with information about Data translation for product catalog.
		Browsing Catalog	Updated the topic with information about Data translation for product catalog.
		Viewing the Product Details	Updated the topic with information about Data translation for product catalog.

Document	Publication Date	Topic	Description
		SDK Reference	Updated for 202406.2.0 release.

202406.1.0

Document	Publication Date	Topic	Description
202406.1.0	02 Jul 2024	Configuring Cart Pricing Status Retry Settings	New topic.
		Configuring Templates	Updated the topic with information about cartRetryLimit and cartRetryDelay.
		SDK Reference	Updated for 202406.1.0 release
		Working with the Cart	Updated the topic with information about Check Status and Abandon Cart.
		Browsing Catalog	Updated the topic with information about Check Status and Abandon Cart.
		Adding Products to a Cart	Updated the topic with information about Check Status and Abandon Cart.
		Comparing Products	Updated the topic with information about Compare and Select All for mobile view.

202405.2.0

Document	Publication Date	Topic	Description
202405.2.0	14 Jun 2024	SDK Reference	Updated for 202405.2.0 release

202405.1.0

Document	Publication Date	Topic	Description
202405.1.0	07 Jun 2024	Managing Assets	Updated topic with information about buy more assets.
		SDK Reference	Updated for 202405.1.0 release

202404.2.0

Document	Publication Date	Topic	Description
202404.2.0	10 May 2024	Managing Assets	Updated topic with information about installed products page and label change for amend action.
		Configuring Templates	Updated topic with information about custom labels for asset actions.
		SDK Reference	Updated for 202404.2.0 release

202404.1.0

Document	Publication Date	Topic	Description
202404.1.0	10 May 2024	Managing Assets	Updated topic with information about Terminate and Buy More actions.
		SDK Reference	Updated for 202404.1.0 release

202403.3.0

Document	Publication Date	Topic	Description
202403.3.0	18 Apr 2024	Managing Assets	Updated topic with information about Amend action.
		SDK Reference	Updated for 202403.3.0 release

202403.2.0

Document	Publication Date	Topic	Description
202403.2.0	03 Apr 2024	Viewing the Product Details	Updated topic with information about retry pricing options.
		Applying Promotions	Updated note with information about recommended number of products for this feature.
		SDK Reference	Updated for 202403.2.0 release

202403.1.0

Document	Publication Date	Topic	Description
202403.1.0	20 Mar 2024	Managing Orders	Updated topic with information about attachment access for guest users.
		Managing Quotes	
		SDK Reference	Updated for 202403.1.0 release

202402.2.1

Document	Publication Date	Topic	Description
202402.2.1	07 Mar 2024	Viewing the Product Details	Updated topic with information about recommended product feature enhancement.
		Working with the Cart	

Document	Publication Date	Topic	Description
		Managing the Cart	Updated topic with information about contract pricing.
		Working with the Cart	
		SDK Reference	Updated for 202402.2.1 release

February '24

Document	Publication Date	Topic	Description
February '24	14 Feb 2024	Browsing Catalog	Updated topic with information about adding multiple products to the cart, and retry pricing.
		Adding Products to a Cart	Updated topic with information about adding multiple products to the cart, preventing users from adding products without configuring first, and retrying pricing.
		Setting Up Master Data	Updated topic with information about how to set a flag preventing users from adding products without configuring first.
		Setting Up a Guest User	New topic
		Launching Digital Commerce	Updated topic with information about guest user.
		Deleting Primary Line Items	Updated topic with information about deleting multiple products from the cart.
		Cloning Primary Line Items	Updated topic with information about cloning primary line items.

Document	Publication Date	Topic	Description
		Managing the Cart	Updated topic with information about cloning a cart and deleting multiple carts.
		Working with the Cart	Updated topic with information about cloning a cart and searching line items.
		Managing Quotes	Updated topic with information about creating a quote first, then adding line items (products) to the quote, generating a quote document, and viewing quote summary charts.
		Managing Orders	Updated topic with information about generating a quote document, and viewing order summary charts.
		Creating Flow and View for the Cart Details Page	New topics
		Configuring Cart Line Item Fields	
		Applying Promotions	New topic
		Managing Assets	New topic
		Configuring Data Sync	New topic
		SDK Reference	Updated for February '24 release

October '23

Document	Publication Date	Topic	Description
October '23	03 Oct 2023	Managing Orders	Updated topic with information about confirm order flow.
		Managing Favorites	New topic
		Managing Account	Updated topic with information about the Account dropdown option.
		Product Configuration	Updated topic with information about Product Attribute Rule Matrices support.
		Attribute Based Configuration Rules	
		Revalidating the Product Configuration	New topic
		Managing Orders	Updated topic with information about attachment and CAPTCHA support.
		Managing Quotes	
		Comparing Products	New topic

Document	Publication Date	Topic	Description
		Product Configuration	Updated Option Configuration section with information about the following modification behavior support: • Display Option(s) as a Picklist • Hide Option Groups and Option • Modify Option Groups and Options within a Bundle Configuration • Set Required Option(s) • Exclude Option Product within a Bundle Configuration
		Working with the Cart	Updated topic with information about the Cart Summary section, cart name modification, and cart-level breakup.

June '23

Document	Publication Date	Topic	Description
June '23	07 Jun 2023	All topics	New documentation added in this release.

Digital Commerce for Administrators

This section describes how Digital Commerce works and how to install, implement and deploy Digital Commerce for your customers.

Topic	Description
What's Covered	This section is designed to provide administrators with information on setting up data to be consumed within Digital Commerce. This section covers the most common use cases for administration and assumes a level of familiarity with basic Salesforce.
Primary Audience	Admin users responsible for installing, implementing, and deploying the Digital Commerce solution.
Updates	For a comprehensive list of updates for each release, see What's New in Digital Commerce Documentation.
Other Resources	• See Digital Commerce for Users for basic admin tasks and end-user experience. • See Digital Commerce SDK for technical instructions on the installation and setup of a Digital Commerce storefront. • See Digital Commerce for REST API Developers for details of the CPQ REST APIs consumed by Digital Commerce.

Select one of the following topics for more information:

- Getting Started with Digital Commerce
- System Requirements
- Creating a Storefront Record
- Setting Up a Guest User
- Downloading the Digital Commerce SDK
- Setting Up Master Data
- Creating Flow and View for the Cart Details Page
- Configuring Data Sync
- Setting Up Multi-Language Support

Getting Started with Digital Commerce

As an administrator, you must complete steps 1 through 5 in order to set up the initial configuration for the Digital Commerce application. The implementor can then proceed with steps 6 to 12 for the template and other essential configurations to begin using the application.

1. Check the System Requirements
2. Create an Account
3. Create a Price List
4. Create a Storefront Record
5. Create a Guest User
6. Download the SDK
7. Clone the Reference Template
8. Install the Reference Template
9. Configure the Template
10. Set up the Master Data
11. Configure Data Sync
12. Set up the Translation if required

System Requirements

Before you install and start using or customizing your application, you must set up your environment for Angular development using the Angular CLI tool. This topic includes information about minimum system requirements and configuring the environment variables.

> Command prompt must be run as administrator for all command line operations.

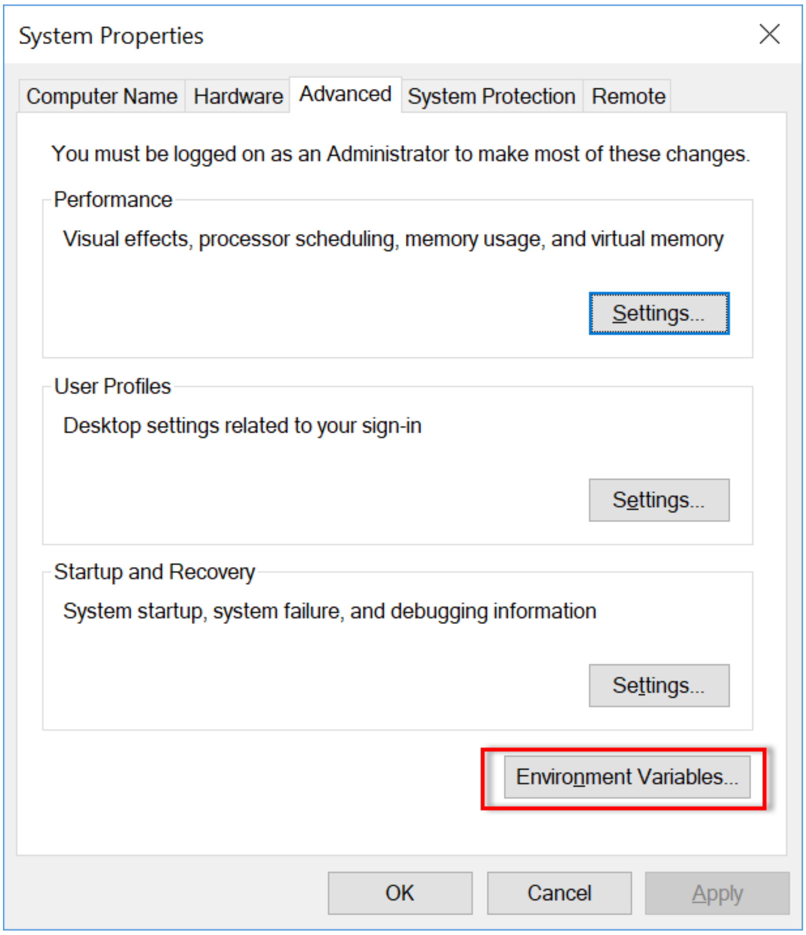
- Node JS v16.18.1 or higher: Install Node JS from the official Node website. For Windows, download Windows installer .msi 64-bit.
- Angular CLI until version 13.0.0:
  - To check if already installed, use the command: *ng -v*
  - If not installed, use the command: *npm install -g @angular/cli*
- Windows Build Tools. Install python gyp using the command: *npm install --global --production windows-build-tools*
- Visual Studio Code

Environment Variables

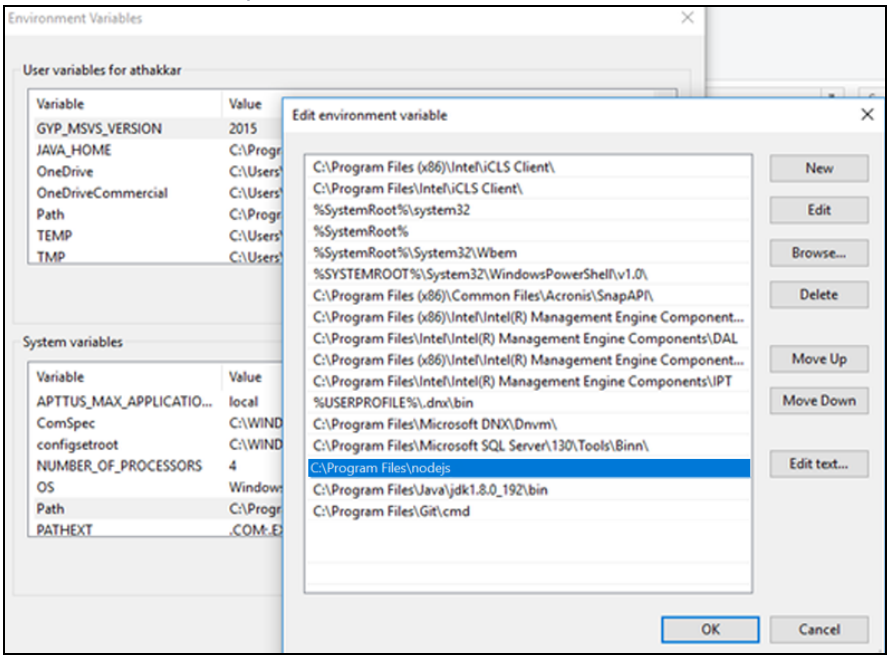
When *NodeJs* is installed, it is necessary that they are accessible globally using the command prompt. Sometimes the environment variables are not configured and you may see errors stating 'node' is not recognized as an internal or external command. You must configure the environment variables on your local system.

To configure environment variables

1. Go to **This PC** > **System Properties** > **Advanced System Settings**.
2. Click **Environment Variables**



3. Add the necessary paths into the **User Variable.**



Creating a Storefront Record

You must create a **Storefront record** and pass the ID to the *storefrontId* parameter in the environment.ts file while configuring the template.

Prerequisites

- You must have an active account associated with a price list. For more information on how to create an account, see Creating an Account.
- You must have an active price list. For more information on creating a price list, see Creating a Price List.

Create a Storefront record

You can use the **POST** `https://<URL_of_the_Instance>/api/revenue-admin/v1/storefronts` API or Admin User Interface, to create a storefront record. Use the following minimum required sample payload to create an account:

```
{
    "Name": "string",
    "DefaultAccount": {
```



```
      "Id": "{default account that you created as a prerequisites}",
      "Name": "{name of the account}"
    },
    "DefaultPriceList": {
      "Id": "{price list (associated with account) that you created as a 
prerequisites}",
      "Name": "{name of the price list}"
    },
    "Channel": "Ecommerce or Partner Commerce as per your business use case.",
  }
```

There are different options for adding a **Price List** to the Storefront record.

1. Pass the *Default Account* details that have a price list attached.
2. Pass the *Default Price List* details directly.

> Suppose both of the above-mentioned options are used while creating a Storefront record, and a default account also has a price list attached. In that case, the **Price List** associated with the default account takes precedence over the price list added directly.

Creating an Account

You can use the **POST** `https://<URL_of_the_Instance>/api/data/v1/Account` API to create an account. Use the following sample payload to create an account:

> Only the Name and Price List are required.

```
{
  "Name": "Conga Account",
  "PriceList": {
    "Id": "Guid",
    "Name": "PriceList Name"
   },
  "BillingAddress": "Billing Address",
  "BillingCity": "Billing City",
  "BillingCountry": "Billing Country",
  "BillingCountryCode": "Billing Country Code",
  "BillingPostalCode": "Billing Postal Code",
  "BillingState": "Billing State",
```

```
  "BillingStreet": "Billing Street",
  "ShippingAddress": "Shipping Address",
  "ShippingCity": "Shipping City",
  "ShippingCountry": "Shipping Country",
  "ShippingCountryCode": "Shipping Country Code",
  "ShippingPostalCode": "Shipping Postal Code",
  "ShippingState": "Shipping State",
  "ShippingStreet": "Shipping Street"
}
```

Next Step: Create a Price List.

Creating a Price List

You can use the following options to create a price list that is required while creating a storefront record:

1. Use the POST `https://<URL_of_the_Instance>/api/revenue-admin/v1/price-lists` with the following minimum required sample payload:

```
{
    "Name": "string",
    "Account": {
      "Id": "{default account that you created as a prerequisites}",
      "Name": "{name of the account}"
    },
    "IsActive": true,
  }
```

2. Use the Revenue Admin User Interface. For more information, see Configuring the Price Lists.

Next Step: Create a Storefront Record.

Setting Up a Guest User

Perform the following steps to set up the guest user:

1. Enable the Guest User functionality using the Organization Management User Interface of the following API: PATCH `https://<URL_of_the_Instance>/api/user-management/v1/organization/info` with the following minimum required sample payload:


```
{
  "GuestUserEnabled": true
}
```

2. Create a guest user using the User Creation User Interface or the following API: POST `https://<URL_of_the_Instance>/api/user-management/v1/user/guest.`

```
{
  "FirstName": "{FirstName}",
  "LastName": "{LastName}",
  "Email": "{}",
  "Alias": "guest",
}
```

> The guest user role and permission group are automatically added for the guest user. Administrators can update the GuestUserPermissionGroup to allow or amend permission for any custom object.

3. Update the `environment.ts > userId` parameter with the guest user ID created in the first step and the `loginEndpoint` parameter with the authentication endpoint for the Guest User functionality.
4. Create a configuration using the following API: POST `https://<URL_of_the_Instance>/api/config-management/v1/configurations` with the following minimum required sample payload to whitelist the APIs that are not part of the out-of-the-box template and that you want to utilize with the guest user functionality:

> - You must pass the exact configuration category and configuration name that are available in the following payload.
> - The syntax pattern must be the same that is available in the following payload. For example, \"Route\":\"*{endpoint}*\",\"Method\":\"*{API method that you want to allow}*\"

```
{
  "Category": "guestuser",
  "Name": "allowedroutes",
```



```
  "Value": "[{\"Route\":\"/api/catalog/v1/products\",\"Method\":\"GET\"},
{\"Route\":\"\/api\/order\/v1\/orders\",\"Method\":\"GET\"},{\"Route\":\"\/
api\/quote\/v1\/quotes\",\"Method\":\"GET\"},
          {\"Route\":\"\/api\/catalog\/v1\/products\/details\",\"Method\":
\"POST\"},{\"Route\":\"\/api\/order\/v1\/order\/{ParentId}\/orderlineitems\",
\"Method\":\"GET\"},
          {\"Route\":\"/api/revenue-admin/v1/storefronts/active\",\"Method\":
\"GET\"},{\"Route\":\"/api/catalog/v1/price-lists/active\",\"Method\":\"GET\"},
{\"Route\":\"/api/catalog/v1/search\",\"Method\":\"GET\"},
          {\"Route\":\"/api/catalog/v1/categories\",\"Method\":\"GET\"},
{\"Route\":\"/api/revenue-admin/v1/accounts/active\",\"Method\":\"GET\"},
          {\"Route\":\"/api/revenue-admin/v1/flows/{flowname}/settings/
{settingname}\",\"Method\":\"GET\"},{\"Route\":\"/api/catalog/v1/search\",
\"Method\":\"POST\"},{\"Route\":\"/api/revenue-
          admin/v1/flows/{flowName}/views\",\"Method\":\"GET\"},{\"Route\":\"/
api/revenue-admin/v1/flows/{flowname}/displays\",\"Method\":\"GET\"},
{\"Route\":\"/api/order/v1/orders/{Id}\",\"Method\":\"GET\"},
          {\"Route\":\"/api/catalog/v1/products/compare\",\"Method\":\"POST\"},
{\"Route\":\"/api/catalog/v1/products/{productId}\",\"Method\":\"GET\"},
{\"Route\":\"/api/quote/v1/quotes/{Id}\",\"Method\":\"GET\"}]"
}
```

The guest user can now use the application according to the permissions granted to the guest user.

Refer to the following troubleshooting help for the guest user functionality:

Guest user redirects to the login screen

Cause 1: The guest user is not created.

Cause 2: The guest user is created, but the guest user functionality is not enabled.

Cause 3: The guest user is created, and the guest user functionality is also enabled, but the `environment.ts` is not updated for the guest user parameters.

Resolution: Refer to the above steps (1 to 3) to set up the guest user.

Downloading the Digital Commerce SDK

Refer to the following points for easy access to the artifacts through a public-facing GitHub repository.

- The Conga Commerce SDK libraries (core, ecommerce, and elements) are hosted at: `https://github.com/orgs/congarevenuecloud/packages` GitHub repository. This is a public repository with read access. This repository contains the following three

packages also called artifacts:
    - core
    - ecommerce
    - elements
- To install the SDK libraries, add the following packages to the `package.json` file before running the `npm install` command:
    - @congarevenuecloud/core
    - @congarevenuecloud/ecommerce
    - @congarevenuecloud/elements
- The above-mentioned packages should be specified along with the release version that you intend to use. For example, if you want to use the most recent release version 2023.2.19, specify it with each package as follows. The most recent release version is tagged as Latest.

```
"@angular/forms": "~13.0.0",
"@angular/platform-browser": "~13.0.0",
"@angular/platform-browser-dynamic": "~13.0.0",
"@angular/router": "~13.0.0",
"@azure/msal-angular": "^2.1.2",
"@azure/msal-browser": "^2.22.1",
"@congarevenuecloud/core": "^2023.2.19",
"@congarevenuecloud/ecommerce": "^2023.2.19",
"@congarevenuecloud/elements": "^2023.2.19",
"@fortawesome/fontawesome-free": "^5.12.0",
"@ng-select/ng-option-highlight": "0.0.5",
```

- After the SDK libraries are built, they are published to the GitHub release registries here:
    - For digital commerce template: `https://github.com/congarevenuecloud/e-commerce`

For all these changes, ensure that all the consumable code base is under a single repository.

> **Important**
>
> After cloning the reference template, you must update the ***npmrc file*** in the reference template with the SDK library hosted URL as below. Enter your GitHub authentication token at line 2 after `authToken=`

```
1  @congarevenuecloud:registry=https://npm.pkg.github.com/
2  //npm.pkg.github.com/:_authToken=
```

Select one of the following topics for more information on implementation and configuration:

Cloning the Reference Templates

You can clone a template from the standard repository and customize it as per your specific requirements.

ⓘ Digital commerce template: `https://github.com/congarevenuecloud/e-commerce`

To clone a template from the repository

1. Open the command prompt and type git clone and the URL of the template. See the following example:


2. Press **Enter** on your keyboard.

Your template is cloned. You can now open the code for the cloned template.

Installing the Reference Template

Important

To access the new features and enhancements delivered in the 202408.3.0 release, use the latest SDK packages and reference templates from the GitHub release registries:

- https://github.com/congarevenuecloud/e-commerce/releases: Search and select the 202408.3.0 release.

- https://github.com/orgs/congarevenuecloud/packages: Use the 202408.3.8 package of core, ecommerce, and elements.

Prerequisites

You must have a GitHub account and a valid GitHub authentication token to install the packages from the repository.

In case you face issues installing the SDK, you may need to authenticate using your GitHub token.

Important

After cloning the reference template, you must update the ***npmrc file*** in the reference template with the SDK library hosted URL as below. Enter your GitHub authentication token at line 2 after `authToken=`

```
@congarevenuecloud:registry=https://npm.pkg.github.com/
//npm.pkg.github.com/:_authToken=
```

Installing npm

After updating the npmrc file, run `npm install` from the root of your project's resources folder. This command installs third-party libraries, including the `congarevenuecloud/e-commerce` library listed in the `package.json` file, which contains all the components and data access layers. Once done, the SDK and its dependencies will be ready to use.

You can verify that the dependencies are installed by looking at the **node modules folder** and in that folder **congrevenuecloud** > **SDK library** folders (i.e. core, ecommerce, elements etc.) are created in the **resources folder**.

Configuring Templates

You can open the repository folder on your local machine to check the setup.

A new folder named *node_modules* is created. You should never modify anything in the *node_modules* folder. This folder is not part of the repository. All the third-party dependencies get installed in this folder. Whenever you run an npm command the dependencies are overridden in this folder.

Configuration Parameters

During the npm install phase, a configuration file named *environment.ts* is automatically created. This is a runtime configuration for the application. The *environment.ts* file contains runtime specific variables that help the application to operate. You must set it up with the following parameters:

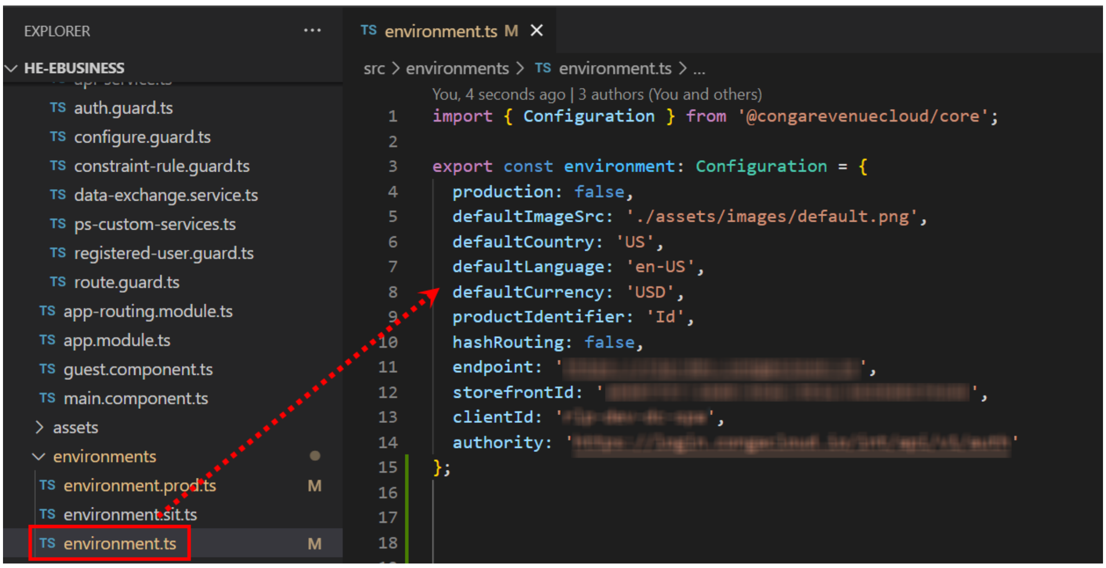
Name	Type	Required	Default Value	Description
production	Boolean	Yes	-	Specify the environment where you want the application to run.
defaultImageSrc	String	Yes	-	Specify the URL of the default image to use when no image is found.
defaultCountry	String	No	US	The default country code is "US".
defaultLanguage	String	No	en-US	The default locale is "en-US".
defaultCurrency	String	No	USD	The default currency to use for guest users. Defaults to "USD".
productIdentifier	String	No	Id	The API name of the field on the product to use as the unique identifier in the application.
proxy	String	No	-	The login proxy to use to bypass CORS restrictions on login.
storefrontId	String	Yes	Null	Specify the ID of the storefront record.

Name	Type	Required	Default Value	Description
hashRouting	Boolean	No	False	To support the hash URL path, set it to true.
endpoint	String	Yes	-	Specify the Conga Platform instance where your tenant is onboarded. For example: `https://test.congacloud.com`
authenticationEndpoint	String			
loginEndpoint	String	Yes		It is the authentication endpoint for the Guest User functionality. For example: https://login-test.congacloud.com This parameter is only required if you use the Guest User functionality.
userId	String	Yes		It is a string identifier that corresponds to the Guest User ID for the Guest User created on the Conga Platform. For more information on how to create a guest user, see Adding and Activating Users. This parameter is only required if you use the Guest User functionality.
cartRetryLimit	number	No	5	Specify the number of retry attempts for fetching the active cart's status until pricing completes. The application first considers the PricingCircuitMaxRetries value for fetching the active cart's status. For more information, see Configuring Cart Pricing Status Retry Settings.

Name	Type	Required	Default Value	Description
cartRetryDelay	number	No	500	Specify the delay in milliseconds between each retry attempt until pricing completes. ⚠ The application first considers the PricingCircuitDelay value for delay in milliseconds between each retry attempt. For more information, see Configuring Cart Pricing Status Retry Settings.
captchaSiteKey?	String	No	-	reCAPTCHA keys represent how reCAPTCHA Enterprise is configured for a website. For more information on how to create keys, see Create reCAPTCHA keys.
translationModule	String	No	Null	Specify the translation module name. • If you do not pass the module name, the application by default considers the local translation file. • If you want to use the translation defined at the Conga Platform level, then pass the module name created on the Conga Platform. For more information on how to create module and translation and about local translation files, see Setting Up Multi-Language Support. ⚠ If you provide the module name created on the Conga Platform but there are no translation details available, then the system will display an application error.
clientId	String	Yes	Null	This is used for OAuth handshake.
authority	String	Yes	Null	To redirect the UI app to the login screen for authentication and authorization.

Name	Type	Required	Default Value	Description

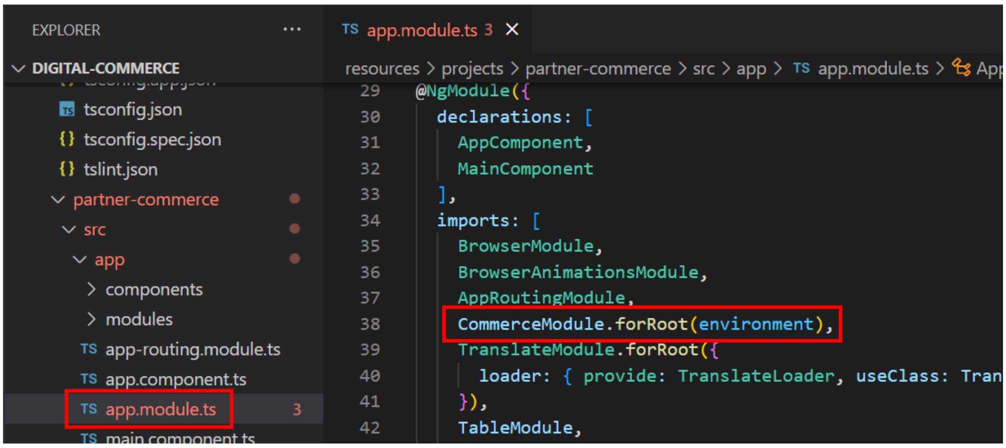
assetActionLables	String	No	-	Set a custom label name (key and value pair) for the asset action(s).
				If you want to display your asset actions Renew and Amend as Custom_Renew and Custom_Amend, refer to the sample below. Here, the key (Renew and Amend) represents the asset action specified in your code.
				`assetActionLables: {`
				`'Renew':'Custom_Renew',`
				`'Amend':'Custom_Amend'`
				`}`
				⚠ Ensure that the `configuration.model.ts` file has `assetActionLabels?: Object` entry to use the custom label for the asset feature.
				For more information on Asset-based ordering (ABO), see Managing Assets.



Importing the app module into the root module

CommerceModule.forRoot - In the forRoot method of the CommerceModule declare the storefront that you want to use. For example, CommerceModule.forRoot('Tier 1')

This defines the Storefront for your application.



Configuring Cart Pricing Status Retry Settings

This topic explains how to configure the retry attempts and delay settings for cart pricing calculations within the application, including the use of config system properties, environment.ts file settings, and default SDK values.

When a user adds a product to the cart, the application calculates the cart's pricing. If pricing fails, you can configure the following settings to specify the number of times the application will fetch the active cart's status and the delay between each attempt until pricing completes.

Config System Properties

Use the PUT https://<URL_of_the_Instance>/api/revenue-admin/v1/flows/system/settings/ConfigSystemProperties API and set the PricingCircuitMaxRetries and PricingCircuitDelay flags.

- **PricingCircuitMaxRetries:** controls the maximum number of retry attempts for fetching the active cart's status.
- **PricingCircuitDelay:** sets the delay between retries to fetch pricing status.

Refer to the following sample payload for 5 retries with a 300 millisecond retry interval:

Sample Payload

```
{
  "PricingCircuitMaxRetries": "5",
  "PricingCircuitDelay": "300"
}
```

To retrieve the flag settings, use the following API:

GET https://<URL_of_the_Instance>/api/revenue-admin/v1/flows/system/settings/ConfigSystemProperties

environment.ts File

Set the value for the cartRetryLimit and cartRetryDelay parameters available in the environment.ts file. To set these parameters, see Configuring Templates.

The application uses the following precedence to determine the retry and delay values for fetching cart status:

1. Config System Properties
2. environment.ts File

For example, if you have only set the PricingCircuitMaxRetries flag in the Config System Properties, the application uses the delay value set in the cartRetryDelay parameter in the environment.ts file.
If none of the above settings is configured, the application uses the default values (5 retry attempts with a 500-millisecond delay) from the SDK. For more information see SDK Reference.

If the price process of the cart takes longer than expected, the application attempts to fetch the cart status again for the number of retry attempts and inter-attempt delay specified in the cart status retry settings. If pricing the cart takes longer, these options are presented:

- **Check Status**: The application will attempt to fetch the cart status again, doubling the number of retry attempts specified while configuring cart status retry settings. For example, if you set 5 retry attempts, the application will attempt 10 retries.

- **Abandon Cart**: Deactivates the current cart and creates a new one. You can then add the products again into the new cart.

Running the Application in Localhost

Now that the SDK and dependent libraries are installed and ready for use, you must use the ***npm run build*** command. This command builds the angular application in your local machine.

To run your application locally on your local machine use the ***ng serve*** command. This command runs the E-Commerce site locally in your local machine against the configuration that you set up during the npm install phase.

Navigate to http://localhost:4200/ to see how your application looks like. The application displays categories, products, pricing, and more based on the Price List selected in the Storefront record. The app is automatically reloaded if you change any of the source files.

Bootstrap Theme Changes

Bootstrap and ngx Bootstrap (angular wrapper to Bootstrap) is installed during the npm install phase. The templates are built around the Bootstrap as a UI framework. You can change to any other mechanism if you don't want to use Bootstrap.

A variables.scss file is installed in the template. If you want to do some quick and easy theme change to your template, you can modify this file as per your requirement. All this follows standard Bootstrap framework constructs to modify cards, dropdowns, forms, buttons, and more.

Setting Up Master Data

For your storefront to display products and pricing associated with it, you must set up master data in Conga CPQ as per your business requirements.

- Product: Define Standalone, Bundle, Option products, etc.

> ⓘ You can use the `IsCustomizable` flag to prevent users from adding products without first configuring them. Set the `IsCustomizable` flag to `true` for the complex product you want the user to configure before adding it to the cart. When this flag is set to true, the user will not see the Add To Cart button for that product on the product catalog or the product configuration page. For more information, see Add Product API and Adding Products to a Cart.

- Pricing: Define Simple Pricing, Price Rulesets, Price Matrix, etc.

For more information on how to create these data using Conga CPQ APIs and the User Interface, see CPQ REST APIs, Product Administration, and Pricing Administration.

Creating Flow and View for the Cart Details Page

You can expose more fields to the end user on the cart details page using the CPQ Admin Console or APIs. You can choose the fields to display, sequence those fields, and set editable fields. Refer to the following steps for creating Flow and View:

1. Set up the **Flow** and add the flow name to the storefront's default field, **DefaultFlow**. If you do not specify a flow name, the application will use **system** flow by default. For more information, see Configuring the Flows or Flow API.
2. Configure the **Column Display** (list and sequence of fields) for the specific flow. For more information, see Configuring Column Settings or Flow Displays APIs.
3. Create a **View** for the specific flow and make it the **default**. For more information, see Managing Cart Views on the Cart Page or Flow View APIs.

For more information on how the end user uses this, see Configuring Cart Line Item Fields.

Configuring Data Sync

The Data Sync feature helps you synchronize data from your existing external system (for example, Salesforce) to the Conga Platform and vice versa. This feature offers the capability to seamlessly sync your data, ensuring that your information is up-to-date and accessible within the Conga Platform.

Below are the supported features in data sync:

- One-time sync from an external system (for example, Salesforce) to the Conga Platform
- Delta data sync from an external system (for example, Salesforce) to the Conga Platform
- Real-time sync data from Conga Platform to external system (for example, Salesforce)

You must set up the data sync infrastructure, perform the object and field mapping, and schedule the data sync. For more information on the data sync setup, see Managing Data Sync.

Setting Up Multi-Language Support

You can set up multi-language support for your site. Translation can be set up for the following:

- Static labels or text (page titles, header, footer, tabs, descriptions) translations
- Schema or field label translations
- Data translation on the product catalog

Static Labels or text (Page Titles, Header, Footer, Tabs, Descriptions)

To translate static labels and text, you can use the local translation folder or add translation details on the Conga Platform.

The following table shows the effect of these translations' availability:

File on Local Translation Folder	Translation details on the Conga Platform	Description
Available	Not Available	The application checks the user's locale and translates static labels or text based on the local translation file. Refer to step 2 below.
Not Available	Available	The application checks the user's locale and translates static labels or text based on the translations added to the Conga Platform. Refer to step 3 below.
Available	Available	The application always merges with unique values, checks the user's locale, and appropriately translates static labels or text.

File on Local Translation Folder	Translation details on the Conga Platform	Description
Not Available	Not Available	The application considers English as a default language.

Perform the following steps to add the translation details:

Step 1: Set the user-level locale

For translation, the application uses the user-level locale. You can set the user's locale using the following API: PATCH https://<URL_of_the_Instance>/api/user-management/v1/users/{userId}.

- Sample request body to set the user's locale to the Spanish (es_ES) language.

```
{
  "LocaleName": "es_ES"
}
```

> ⓘ To list supported locales, use the following API:
> GET https://<URL_of_the_Instance>/api/user-management/v1/locales

Step 2: Add local translation file(s)

The application first checks the local translation files (JSON files used to define translations) in this folder: `https://github.com/congarevenuecloud/partner-commerce/tree/release/february-23/src/assets/i18n` and then translates accordingly. The base template comes with some sample translation files under the `assets/i18n` folder for your reference. You can clone any of the sample files and modify them to accommodate your preferred language.

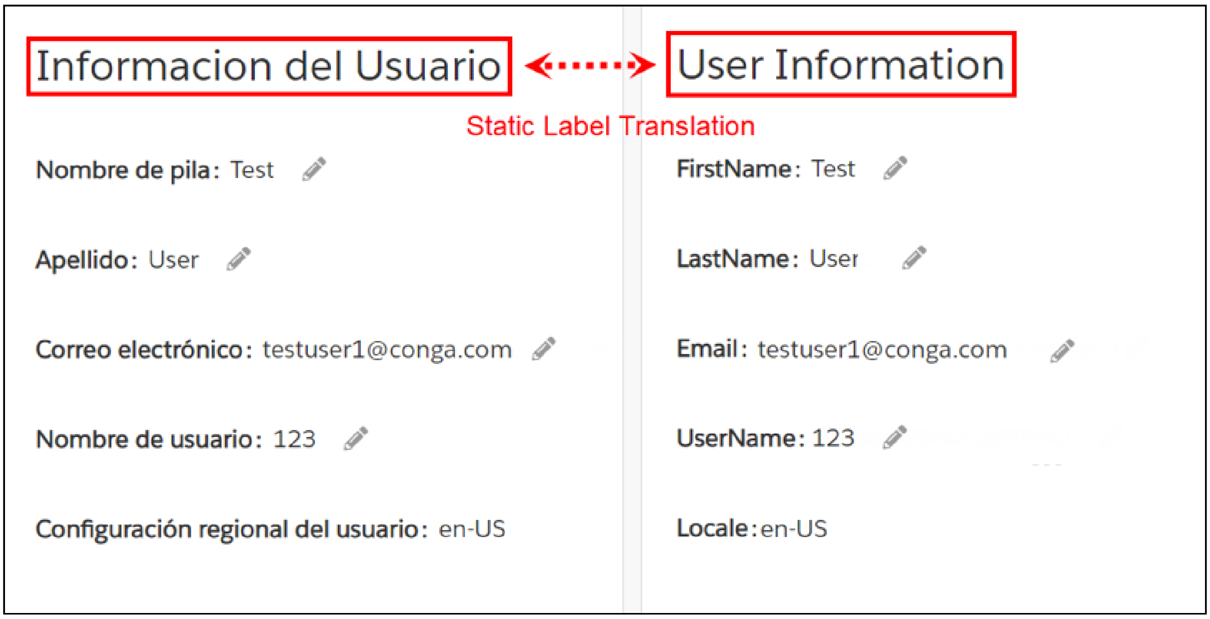
Refer to the table below for the translation sequence.

Step 3: Add translation details on the Conga Platform

1. Add a translation module using the Admin User Interface or the following API: **POST** `https://<URL_of_the_Instance>/api/localization/v1/translations/modules`
2. Update the `environment.ts` > `translationModule` parameter with the module name added in the first step.

3. Add a translation value for the given locale and module using the Admin User Interface or the following API: **POST** https://<URL_of_the_Instance>/api/localization/v1/translations/{locale}/{module}.

> You must use the CustomLabels in the parameter as a Key and the stringified value of your translation JSON file as a Value.
> **For example**:
>
> ```
> {
>   "Key": "CustomLabels"
>   "Value": "<stringified value>"
> }
> ```



Schema or Field Label

Define field label translation for the given object using the following API: **POST** https://<URL_of_the_Instance>/api/schema/v1/objects/{objectName}/translations/{locale}.

> You can also use other **CRUD** operations for *Field Label* translation using Object Definition Translation APIs.

Example 1:

To translate the field label **Phone Number** available on the *Account* object into the **Spanish (es_ES)** language:

1. Use the **POST** `https://<URL_of_the_Instance>/api/schema/v1/objects/{objectName}/translations/{locale}` API.
2. Enter **Account** in the objectName parameter.
3. Enter **es_ES** in the locale parameter.

   To get a list of supported locales, use the following API:
   GET `https://<URL_of_the_Instance>/api/user-management/v1/locales`

4. Use the following sample request body.

```
{
  "ObjectName": "Account",
  "MetadataTranslations": [
    {
      "Scope": "Field",
      "Name": "Phone Number",
      "DisplayName": "Nombre de usuario",
      "Description": "English to Spanish translation for Phone Number field."
    }
  ]
}
```

Example 2:

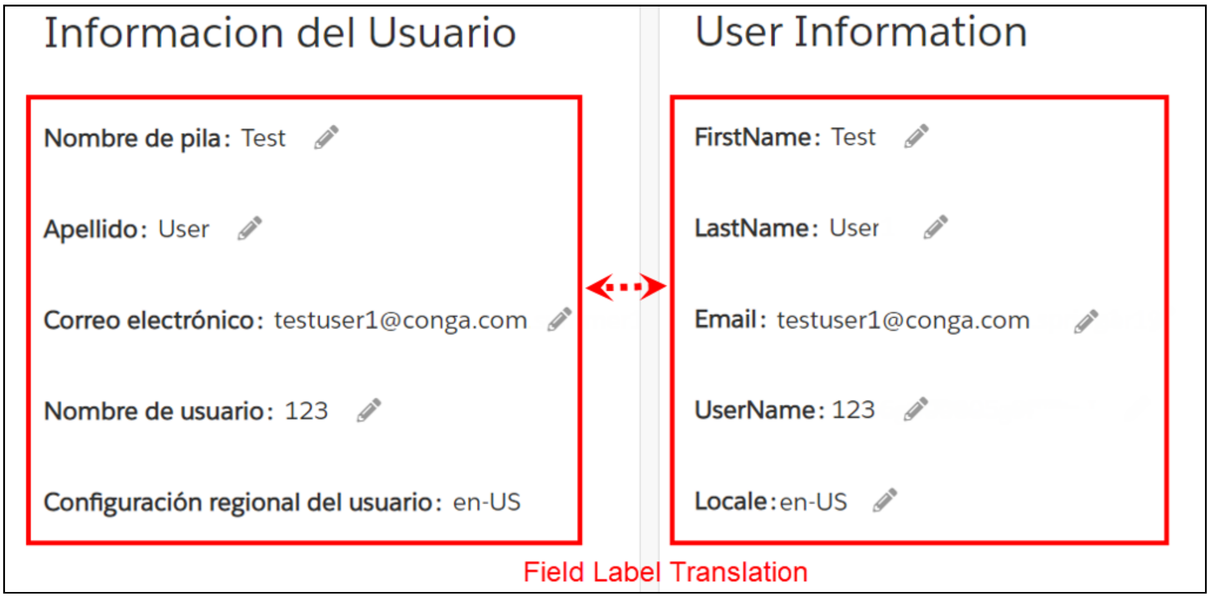
To translate the field label **Email** and **Shipping Address** available on the *Account* object into the **Italian (Switzerland) (it_CH)** language:

1. Use the **POST** `https://<URL_of_the_Instance>/api/schema/v1/objects/{objectName}/translations/{locale}` API.
2. Enter **Account** in the objectName parameter.
3. Enter **it_CH** in the locale parameter.

   To get a list of supported locales, use the following API:
   GET `https://<URL_of_the_Instance>/api/user-management/v1/locales`

4. Use the following sample request body.

```
{
  "ObjectName": "Account",
  "MetadataTranslations": [
    {
      "Scope": "Field",
      "Name": "Email",
      "DisplayName": "Correo electrónico",
      "Description": "English to Spanish translation for Email field."
    },
    {
      "Scope": "Field",
      "Name": "Shipping Address",
      "DisplayName": "Indirizzo di spedizione",
      "Description": "English to Spanish translation for Shipping Address
field."
    }
  ]
}
```



Data Translation on Product Catalog

Data translation localizes such elements as product names, categories, and error messages from the Catalog API. Translation data is configured and verified across Product, Category, Attribute, AttributeGroup, Option, and OptionGroup modules within the product catalog. Use the following steps and APIs to translate data.

To set up data translation

Follow the below steps to set up data translation:

Step 1. Set the user-level locale

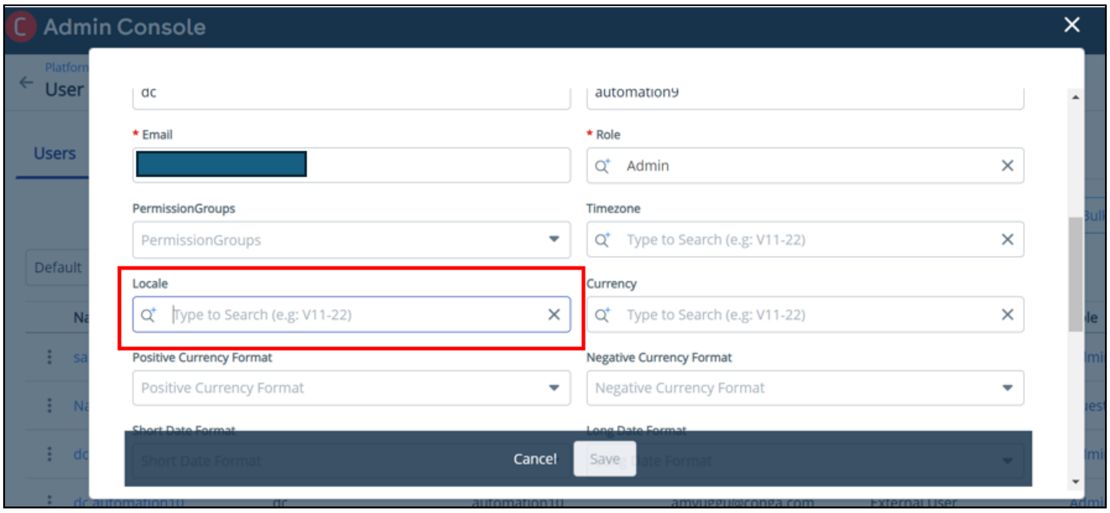
You can set the user-level locale via Admin User Interface using the "To edit a user" topic in the Conga Platform Admin Guide or the following "Update a user" API:

PATCH /api/user-management/v1/users/{userId}

> To list supported locales, use the following API:
> **GET /api/user-management/v1/locales**

To set the user-level locale via Admin UI, follow the steps below:

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher ( ) icon from the top-left corner > **Admin Console** > **Users**.
3. Click the desired active user name link from the User List page, or click the More ( ) icon at the start of the user record.
4. Click **Edit** to update the locale.



5. Search and select the desired locale to set.
6. Click **Save**.

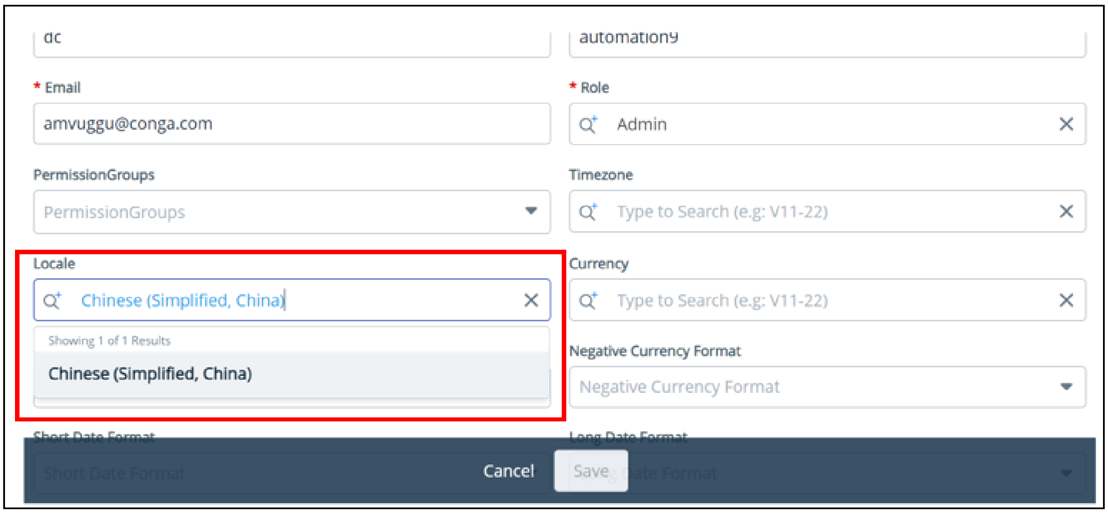
Example

Admin UI

To set the user's locale for Chinese language, follow the steps:

1. Click the desired active user name link from the User List page, or click the More ( ) icon at the start of the user record.

2. Click **Edit** to update the locale.



3. Search Chinese and select it for the locale.
4. Click **Save** to set locale as Chinese.

API

To set the user's locale for Chinese language "zh-Hans-MO", follow the steps below:

1. Use the PATCH /api/user-management/v1/users/{userId} API.
2. Enter the **userId** parameter.
3. Use the following sample request body to update the locale name.

```
{
  "LocaleName": "zh-Hans-MO"
}
```

Step 2. Add translation values

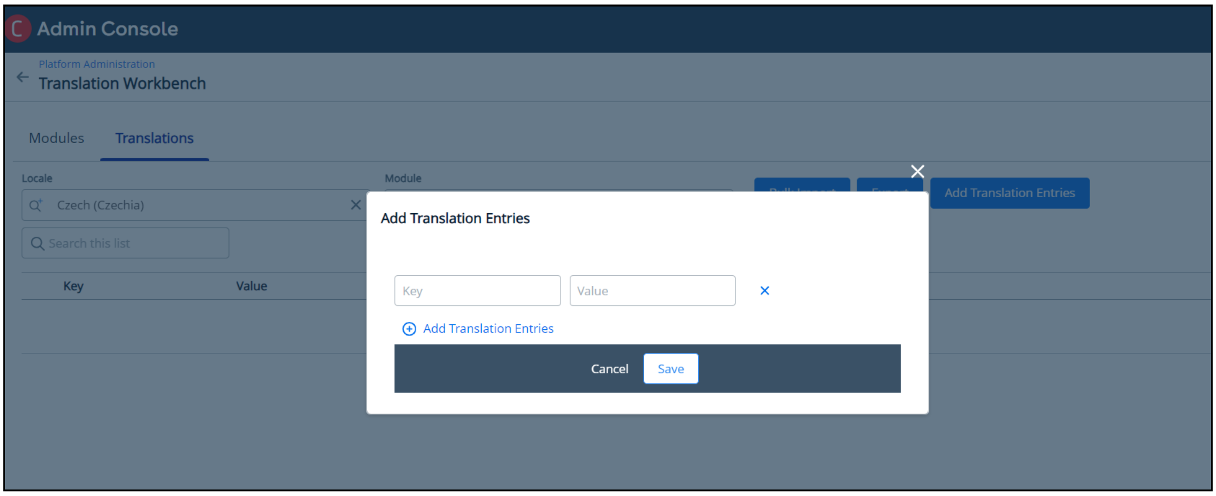
You can add the translation values via Admin User Interface for the module using the "To add translation entries" topic in the Conga Platform Admin Guide or the following "Add translation value" API:
POST /api/localization/v1/translations/{locale}/{module}

To add translation entries via Admin UI, follow the steps below:

1. Log in to the Conga Platform as an admin user.

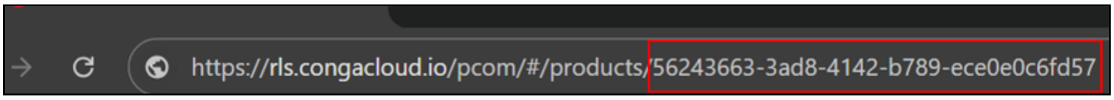
2. Click the App Launcher ( ) icon from the top-left corner > **Admin Console** > **Translation Workbench** > **Translation** tab.

3. Search and select the desired **Locale** and **Module**.
   Add Translation Entries option enables.
4. Click **Add Translation Entries** option to add translation values.



5. Enter product ID in the **Key** field.

   You can find the product ID by clicking the product item in the commerce product catalog and looking for it at the end of the URL.



6. Enter product name and ID as values to add translation details in the **Value** field for the selected locale and module.

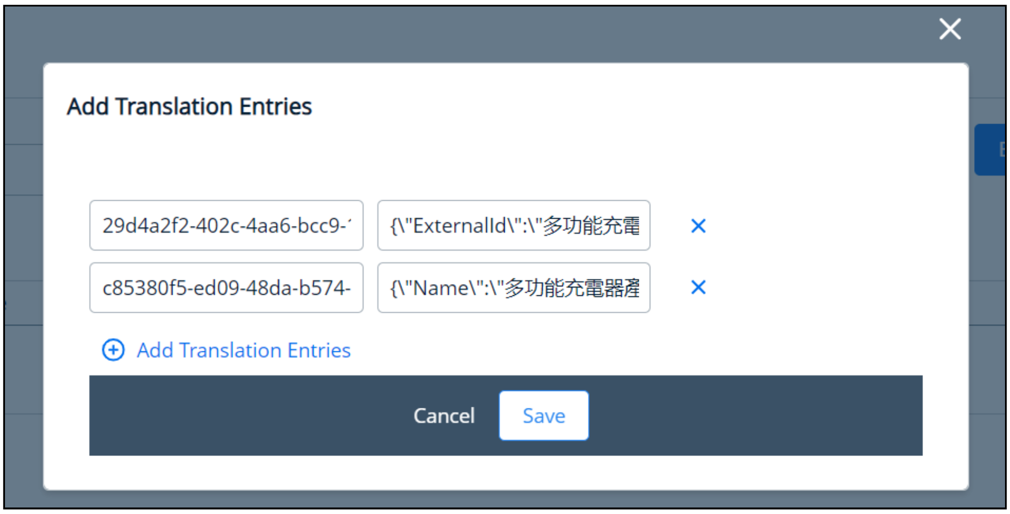
   Value includes an array of fields (mostly of type string, longstring, etc.) where translation can be applied.

7. Click **Save**.

Examples:

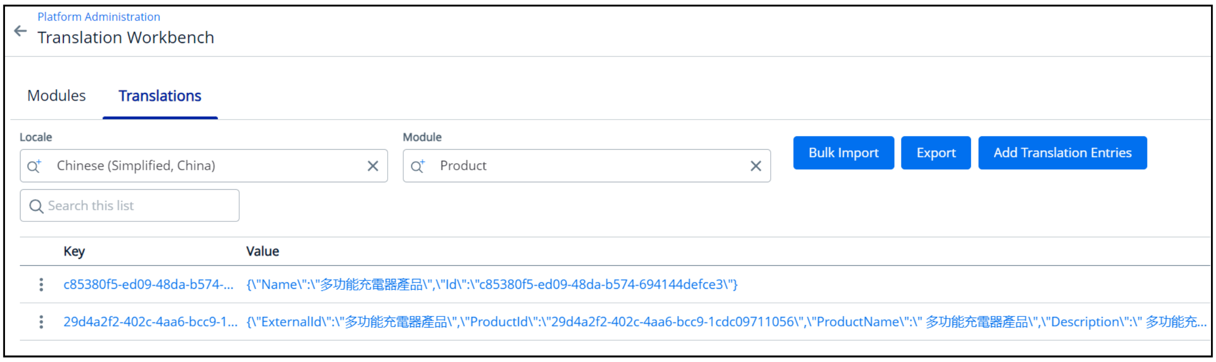
Admin UI

To add Chinese values for product module, follow the steps below:

1. After selecting Locale and Module, click Add Translation Entries option.
   Add Translation Entries popup appears.
   

2. Enter the desired key and values for it.

> For example
> Key: 29d4a2f2-402c-4aa6-bcc9-1cdc09711056
> Value: {\"ExternalId\":\"多功能充電器產品\",\"ProductId\":\"29d4a2f2-402c-4aa6-bcc9-1cdc09711056\",\"ProductName\":\" 多功能充電器產品\",\"Description\":\" 多功能充電器產品\",\"Id\":\"29d4a2f2-402c-4aa6-bcc9-1cdc09711056\", \"ProductCode\":\" 多功能充電器產品\"}

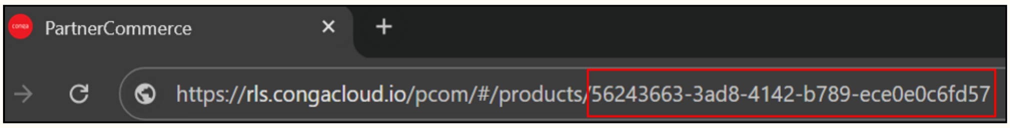
3. To add multiple translation entries, click Add Translation Entries icon.
4. Click **Save** to save the translation entries.
   Translations Entries are available in the application for the selected locale and module.
   

API

To add Chinese "zh-Hans-MO" values for product module, follow the steps below:

1. To add translation values, use POST method /api/localization/v1/translations/{locale}/{module} API:
2. Enter **zh-Hans-MO** for locale parameter.

3. Enter **Product** for module parameter.
4. Use the following samples request body.

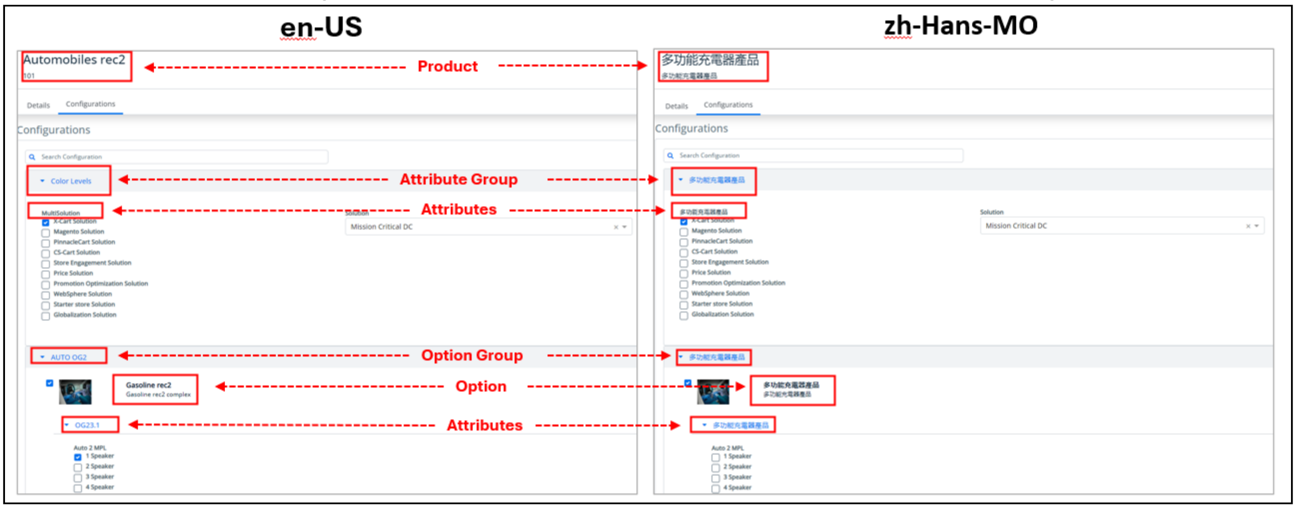
> ⚠ You can use the product ID as a key and the product name and ID as values to add translation details. To get a product ID, click the product item and look for it at the end of the URL:
>
> 
>
>
> ```
> {
>   "Key": "string",
>   "Value": "string"
> }
> ```

Translation data model request body sample

```
{
  "Key": "29d4a2f2-402c-4aa6-bcc9-1cdc09711056",
  "Value": "{\"ExternalId\":\"多功能充電器產品\",\"ProductId\":\"29d4a2f2-402c-4aa6-bcc9-1cdc09711056\",\"ProductName\":\" 多功能充電器產品\",\"Description\":\" 多功能充電器產品\",\"Id\":\"29d4a2f2-402c-4aa6-bcc9-1cdc09711056\",\"ProductCode\":\" 多功能充電器產品\"}"
}

AttributeGroup
{
  "Key": "c85380f5-ed09-48da-b574-694144defce3",
  "Value": "{\"Name\":\"多功能充電器產品\",\"Id\":\"c85380f5-ed09-48da-b574-694144defce3\"}"
}

Attribute
{
  "Key": "eee0fdb3-d290-43b3-a1b9-929152518dd2",
  "Value": "{\"DisplayName\":\"多功能充電器產品\",\"Id\":\"eee0fdb3-d290-43b3-a1b9-929152518dd2\"}"
}
```

```

OptionGroup

{
  "Key": "ff2238a8-1484-49ed-98c8-6437a9979b8e",
  "Value": "{\"Label\":\"多功能充電器產品\",\"Id\":\"ff2238a8-1484-49ed-98c8-6437a9979b8e\"}"
}

category
{
  "Key": "f5cd71c1-5b05-4a2d-b4db-0e7dc7e6fb24",
  "Value": "{\"Label\":\"硬體配置器\",\"Id\":\"f5cd71c1-5b05-4a2d-b4db-0e7dc7e6fb24\"}"
}

api_error_message

{
  "Key": "PRICELIST_IS_INVALID",
  "Value": "多功能充電器產品"
}
```

The application displays the translated modules based on the provided key and value.



You can review the implemented changes for the product at the catalog level. For more information, see Browsing Catalog and Viewing the Product Details.

Digital Commerce for Users

This section describes how Digital Commerce works and how customers can quickly select products and checkout having a seamless purchasing experience.

Topic	Description
What's Covered	This section is designed to provide users with information on features and related user interactions to be consumed within Digital Commerce.
Primary Audience	End users (Customers) who want to purchase products from your storefront.
IT Environment	For information pertaining to the requirements and recommendations, see System Requirements and Supported Platforms Matrix.
Updates	For a comprehensive list of updates for each release, see What's New in Digital Commerce Documentation.
Other Resources	• See Digital Commerce for Administrators for implementation and deployment procedure. • See Digital Commerce SDK for technical instructions on the installation and setup of a Digital Commerce storefront. • See Digital Commerce for REST API Developers for details of the CPQ REST APIs consumed by Digital Commerce.

This section describes the following tasks:

- General Administration
- Browsing Catalog
- Product Configuration
- Managing and checking out the cart
- Generating the quote
- Confirming the order

Select one of the following topics for more information:

- Launching Digital Commerce
- Managing Account

- Browsing Catalog
- Managing the Cart
- Managing Favorites
- Managing Quotes
- Managing Orders
- Managing Assets
- Using CTA (call-to-action) "Quick-Add" button

Launching Digital Commerce

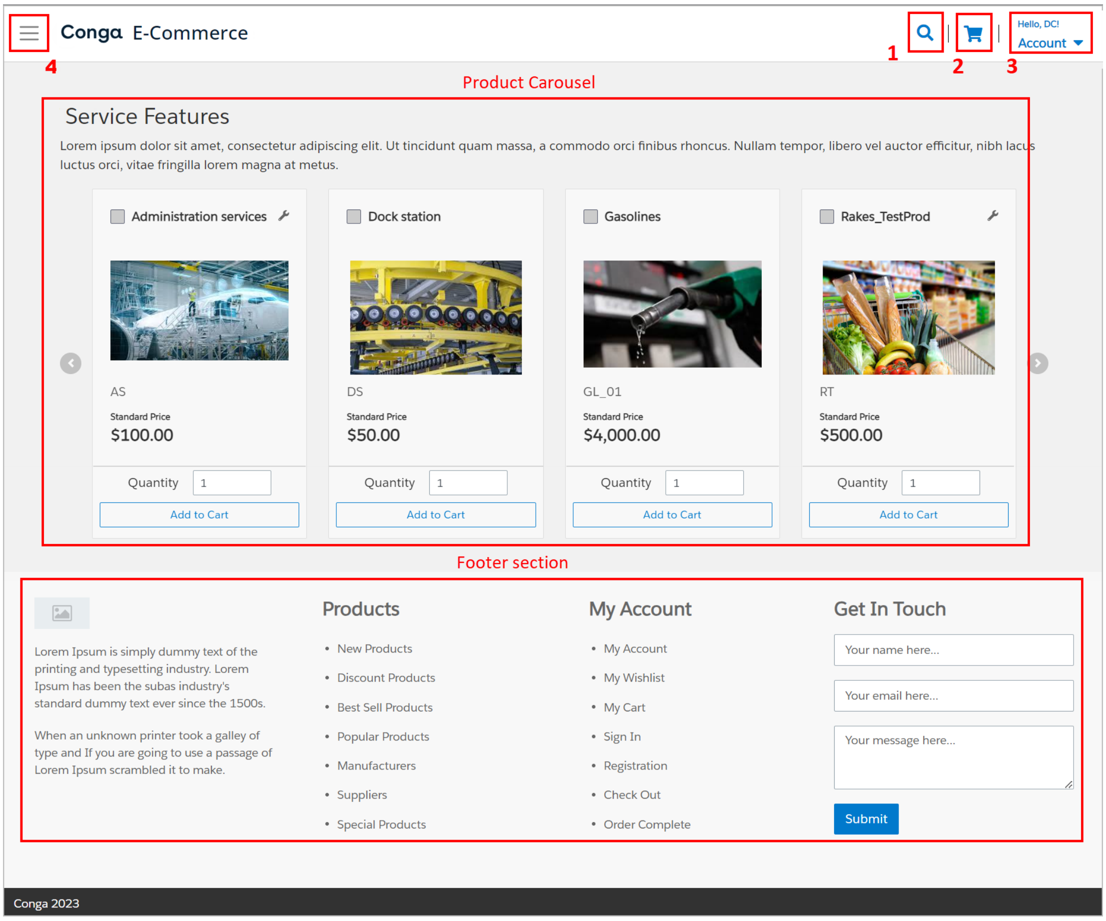
Prerequisites

- You must be onboarded on the Conga Platform. Contact your Conga Representative for the onboarding.
- You must update the **environment.ts** file with clientId, Authority, etc. You will get all this information after onboarding.

When you launch Digital Commerce, the landing (home) page appears. A landing page is the initial or main page of your storefront where you can do the following:

A landing page is the initial or main page of your storefront from where you can do the following:

- The header section on the top provides capabilities such as:
    a. Search for the product
    b. Review the Mini and Main Cart
    c. Review Account information and other links to directly access the My Orders, My Quotes, My Carts, and Favorites sections.
    d. Access your Account Page and Product Catalog
- Product Carousel (Highlighted Products)
- Footer section - Implementors can utilize this section to add links and information according to their business needs.



There are two types of users who can access your storefront - **Guest User** and **Logged in User**.

As a **guest user**, you can:

- Launch Digital Commerce Application
- View Product Drawer (Highlighted Products)
- Browse the catalog page, navigate through the category hierarchy, and add to the cart.
- Use text search to search and select a product or product family.
- View the product details along with its configuration.
- Configure complex products as follows:

- Multi-Level Bundles (Nested Bundles)
- Options & Attributes Configuration

- Product Level Attributes
- Option Level Attributes

- **View Constraint Rules and add to the cart from the Catalog page.**
- **View and manage mini cart.**
- **Request for a quote**

- **Checkout of cart (place order)**

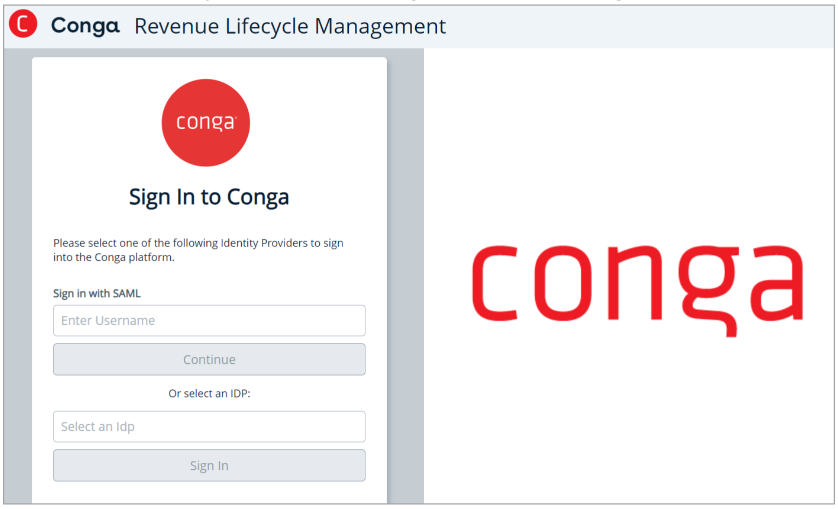
> ⓘ Regardless of when the user registers or not, they can access all their carts, quotes, orders, and so on that they created both before and after the registration event whenever they return to the portal.

As a **logged in user**, you can:

- Access your account page to:
    - View the list of orders and their details
    - View the list of quotes and their details
    - View Carts and their statuses
    - Use the settings option to view the user and account information
- Review your account information
- Browse the catalog page, navigate through Category Hierarchy, and add to the cart.
- Configure products as follows:
    - Multi-Level Bundles (Nested Bundles)
    - Options & Attributes Configuration
        - Product Level Attributes
        - Option Level Attributes
- View and manage mini cart
- Request a Quote
- Place an Order

To log in to Digital Commerce

1. Open the URL in your system's browser.
2. Click the **Menu** (☰) icon from the upper left corner of the page.
   --or--
   Click the **Account** dropdown from the upper right corner of the page.

3. Click the **Sign In** option.
   It will redirect you to the Conga Platform login screen.
   

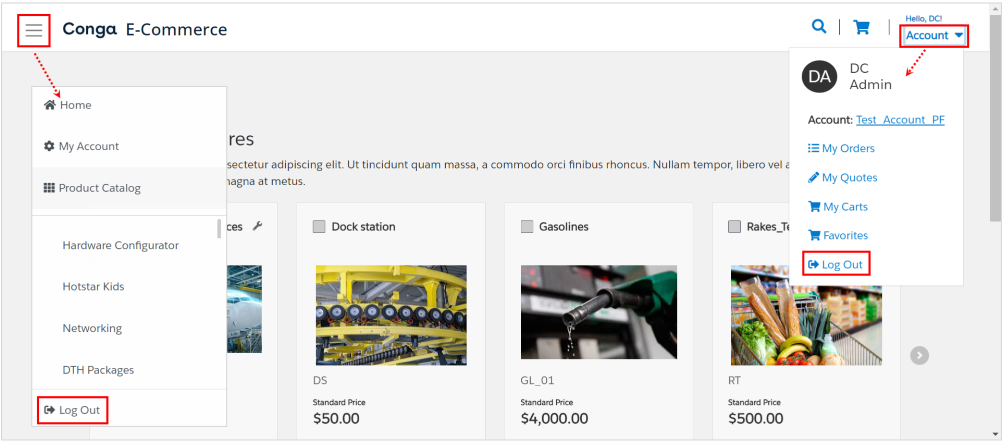
4. If you wish to use SAML to log in, enter your username, or select the Identity Provider from the list to sign in using IDP credentials.
5. Click **Continue** or **Sign In** depending upon the Sign In method you have selected.
   You are redirected to the respective Identity Provider login screen.
6. Enter your username and password and click **Log In.**
   If you forgot your password, follow the selected Identity Provider's process to reset your password.

On successful authentication, if you are a licensed user, you are redirected to the Digital Commerce portal's home page.

To log out from Digital Commerce

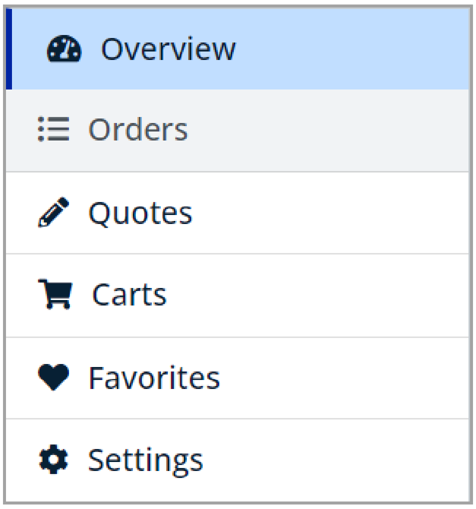
1. From the Partner Commerce home page,
   Click the **Menu** ( ) icon from the upper left corner of the page.
   --or--
   Click the **Account** dropdown from the upper right corner of the page.
2. Click the **Log Out** option.

You will be redirected to the login screen.



Managing Account

The My Account section contains all the information of a user on your vendor's website. You can access your account after signing in from your vendor's website. Click the **Menu** () icon in the upper left corner of the page > select **My Account**. You are redirected to your account page which contains all the following information.

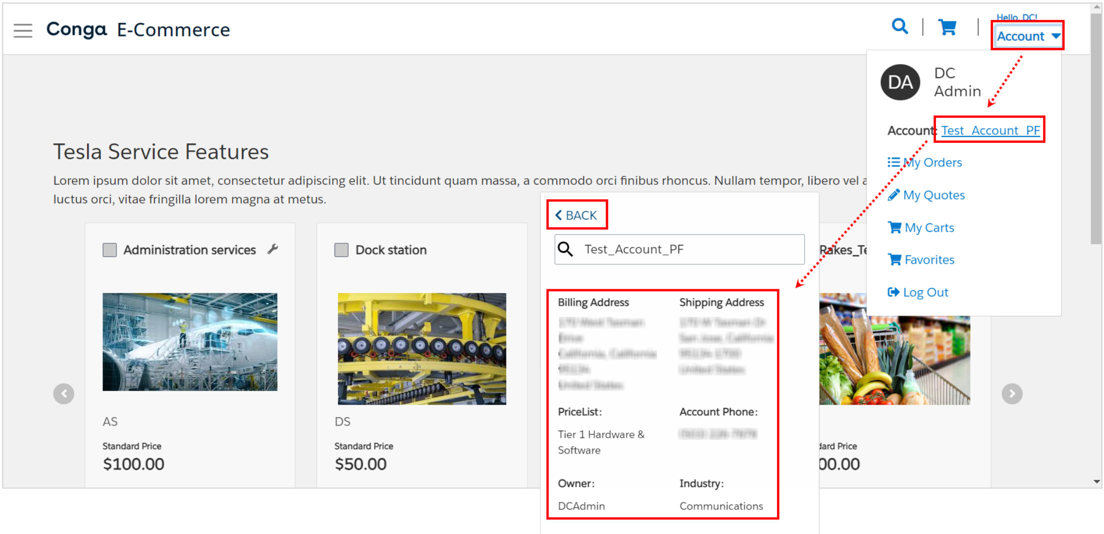


- **Overview**
  - Weekly Orders and Quotes Count
  - Total Spending Amount
  - Recent Orders and Quotes placed in the current week
  - User Information
  - Account Details link to review the account information
- **Orders**
  - Total Order Count
  - Total Order Amount

        - List of all the Orders
            - Search for the specific order
            - Set the number of orders to be displayed per page
    - **Quotes**
        - Total Quote Count
        - Total Quote Amount
        - List of all the Quotes
            - Search for the specific quote
            - Set the number of quotes to be displayed per page
    - **Carts**
        - Total Cart Count
        - Create New Cart
        - List of all Carts
            - Search for the specific cart
            - Set the number of carts to be displayed per page
        - Delete the selected Cart(s)
        - Set the Active Cart
        - Set the effective date
    - **Favorites**
        - Total Favorite Count
        - List of all the Favorites
            - Search for the specific favorite configuration
            - Set the number of favorites to be displayed per page
            - Filter the list using any of the column names
    - **Settings**
        - User Information
        - Update the user information
        - Account Information

Review Account Information

You can review the account information by clicking the **Account** dropdown at the upper right corner of the page. Click the **Account name** link to see the Account information. You can also search for the other account to see the details of that account. To return to the previous screen, click **Back**. You can also directly go to the Orders, Quotes, Carts, and Favorites page using links available next to the Account name.



Browsing Catalog

Product Catalog is a detailed list of the inventory of a store. On the Catalog, you can see the products that your vendor offers. The product catalog displays the products that are available for purchase as well as their details such as the product's name, code, price, and specifications. You can also add products to the cart from the catalog page. The product catalog has many features to assist users in searching for and selecting products.

As an experienced buyer, you can also use the **Quick-Add** ( ) button to add multiple products to the cart and create quotes and orders quickly. For more information, see Using CTA (call-to-action) "Quick-Add" button.

You can access your Orders, Quotes, Carts, and Favorites directly from the catalog page by clicking the appropriate link available under the **Accounts** dropdown. For more information, see Launching Digital Commerce.

The following API is used to get the active products associated with the provided price list ID for the selected account. For more information, click here.

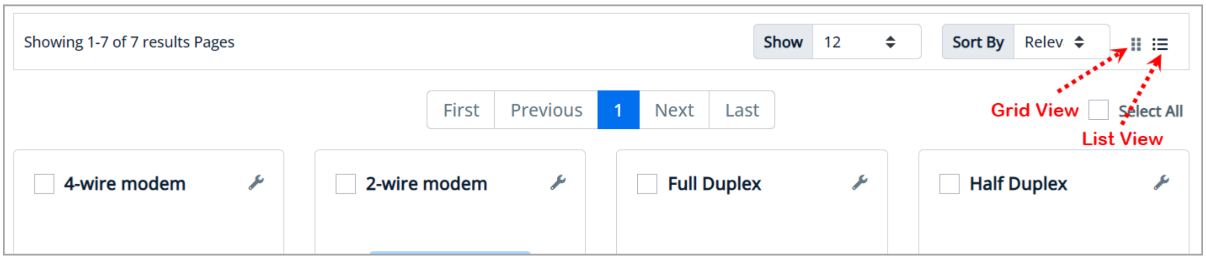
POST `https://<URL_of_the_Instance>/api/catalog/v1/search`

For example: `https://<URL_of_the_Instance>/api/catalog/v1/search?search-type=Product&includes=prices&page={pageNumber}&limit={pageLimit}`

You can also use visibility rules to show only the relevant categories and products to specific users. For more information on how to set visibility rules, click here.

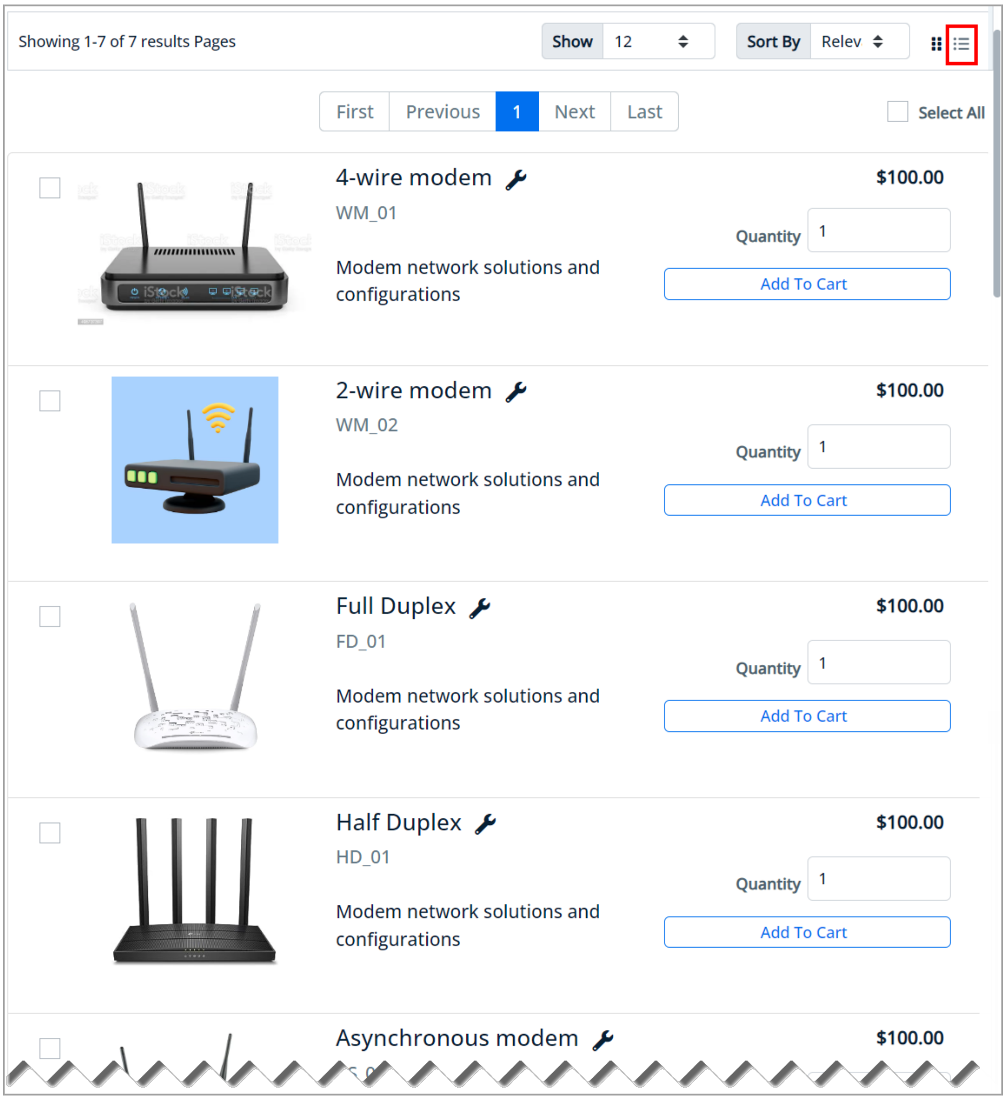
View Options

On the product catalog, you can view products in a variety of ways. There are two view options available on the product catalog page:



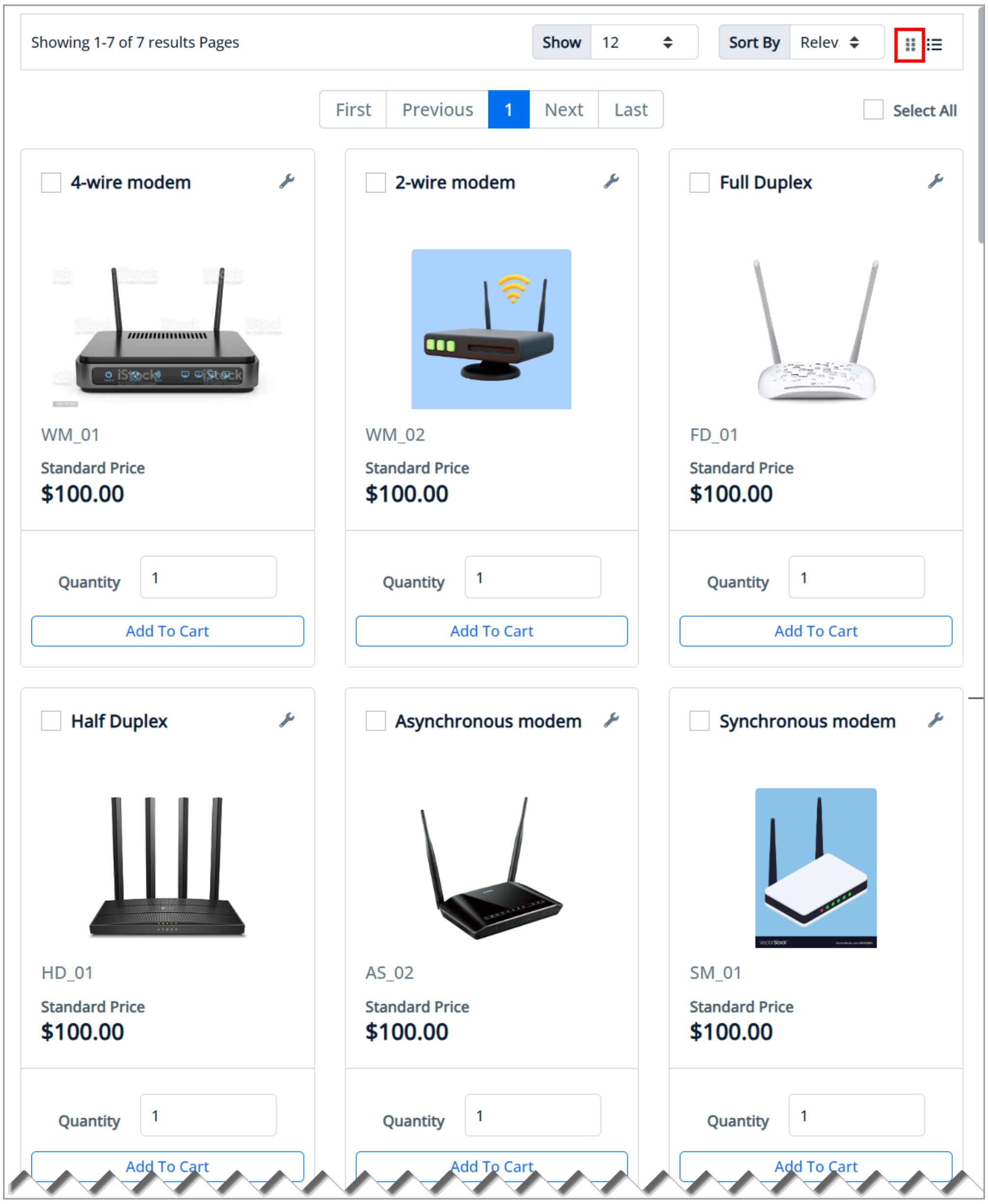
List View

To switch to the list view, click the list view ( ) icon in the bar above the product list. The list view arranges the products in a list, just below each other.



Grid View

To switch to the grid view, click the grid view () icon in the bar above the product list. The grid view arranges the products side-by-side, like a grid.



Filter Products

Since the catalog page displays the entire product inventory, you can use filters to find the right product.

> The following API is used to get the products associated with the selected filter option. For more information, click here.
> **POST** https://<URL_of_the_Instance>/api/catalog/v1/search

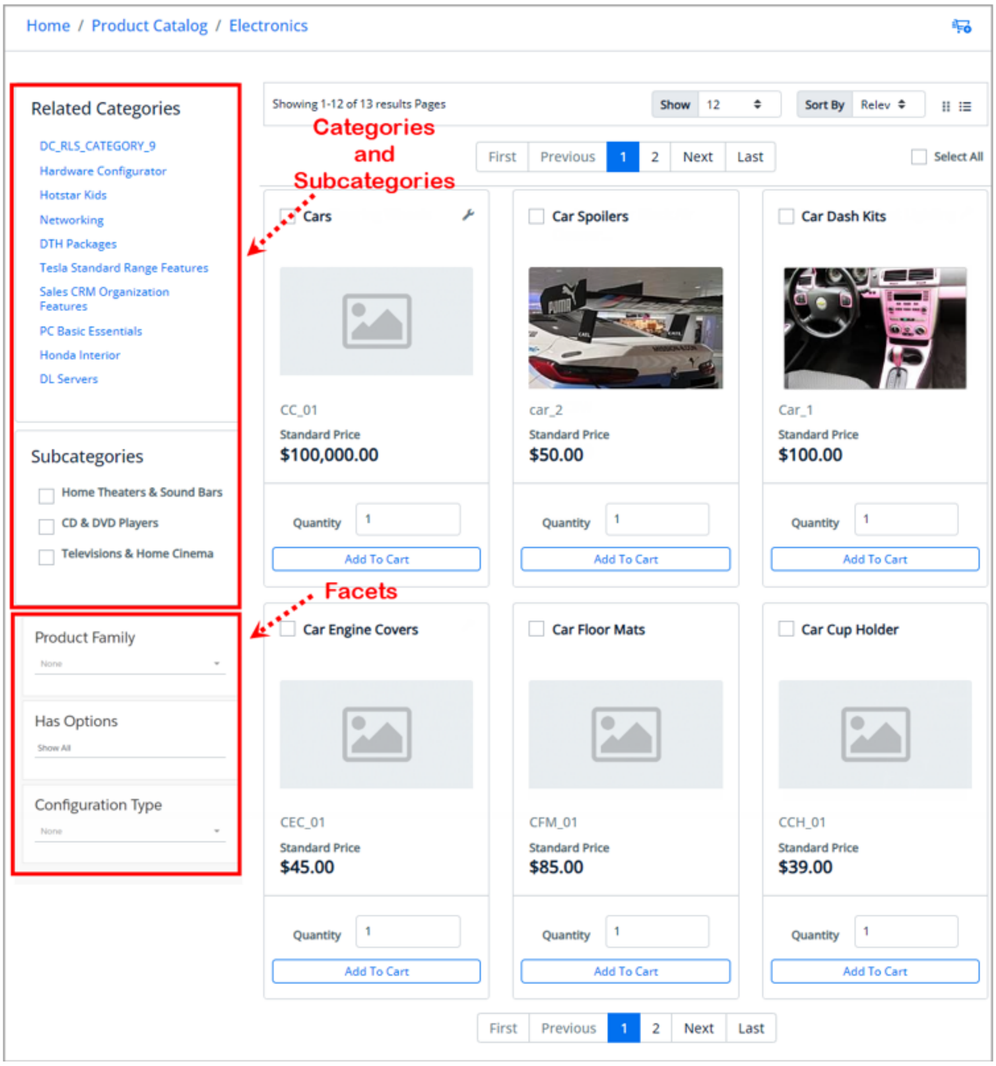
For example: `https://<URL_of_the_Instance>/api/catalog/v1/search?search-type=Product&includes=prices&page={pageNumber}&limit={pageLimit}`

The category hierarchy allows you to navigate to products by browsing the related categories, their subcategories, and facet filters. The list of subcategories and facet filters appears only after you select a category.

The following filed types are supported for facet filters. For example, to filter out a product, we can have two facet filters such as Configuration Type (Boolean: standalone or bundle), and Family (Picklist: software, hardware, and other):

- Picklist
- Multipicklist
- Boolean

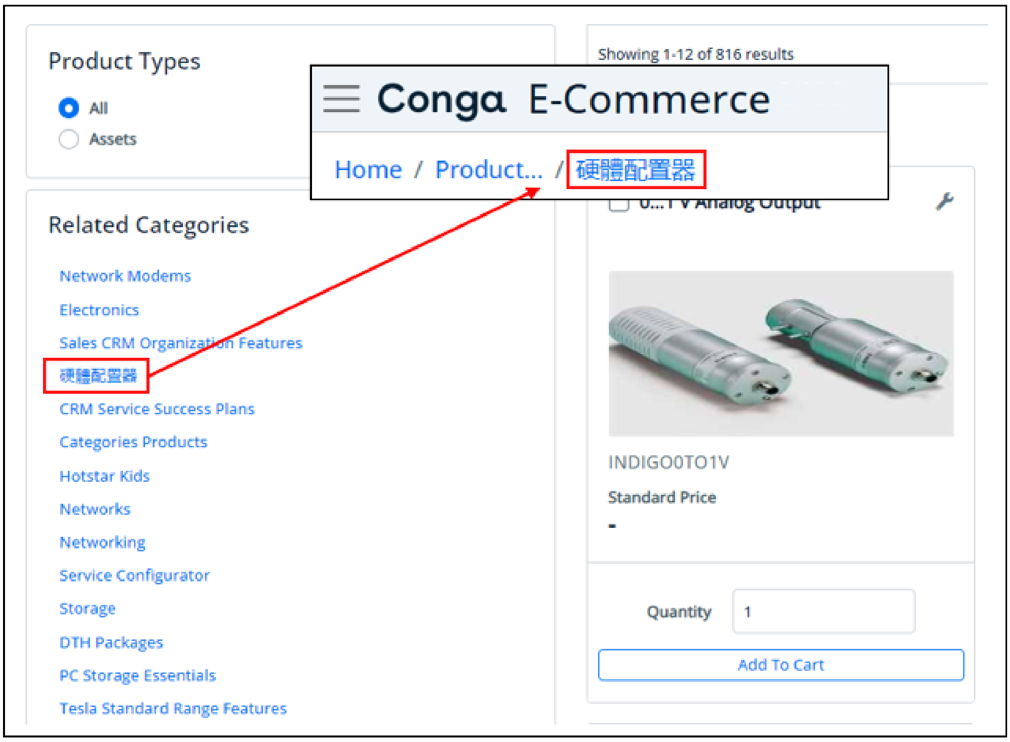
The implementor can use the *SearchFilterFields* option to display the number of facets for the particular category. For example, if you want to use the **Product Family** and **Configuration Type** facets, pass `"SearchFilterFields": ["Family", "Configuration Type"].` For more information, click here.



Data translation in Catalog allows you to display modules and elements as per preferences and locales. Currently, data translation is available for the Catalog and its modules (Product, Category, OptionGroup, Attribute, and AttributeGroup), as well as elements (product names, line item fields, categories, and rule messages). For more information, see Setting Up Multi-language Support.

Example:

When you set the catalog's locale to Chinese, it displays product details and other elements in Chinese.



Actions on the Product Catalog Page

Sorting

Sort By allows you to sort the products on the product catalog page. You can sort the product by **Name** or **Relevance**.

Pagination

Pagination allows you to specify how many products should be displayed on a single page. To set pagination, go to the **Show** field on the top bar and choose from 4, 12, 20, or 50 products on one page.

ⓘ The following APIs with the page, limit, and sort parameters are used for sorting and pagination.

With filter	GET `https://<URL_of_the_Instance>/api/catalog/v1/categories/{categoryId}/products` **For example:** `https://<URL_of_the_Instance>/api/catalog/v1/categories/{categoryId}/products?sort=ASC(Name)page={pageNumber}&limit={pageLimit}`

Without filter	GET `https://<URL_of_the_Instnace>/api/catalog/v1/products` For example: `https://<URL_of_the_Instance>/api/catalog/v1/products?sort=ASC(Name)&page={pageNumber}&limit={pageLimit}`

Viewing product details

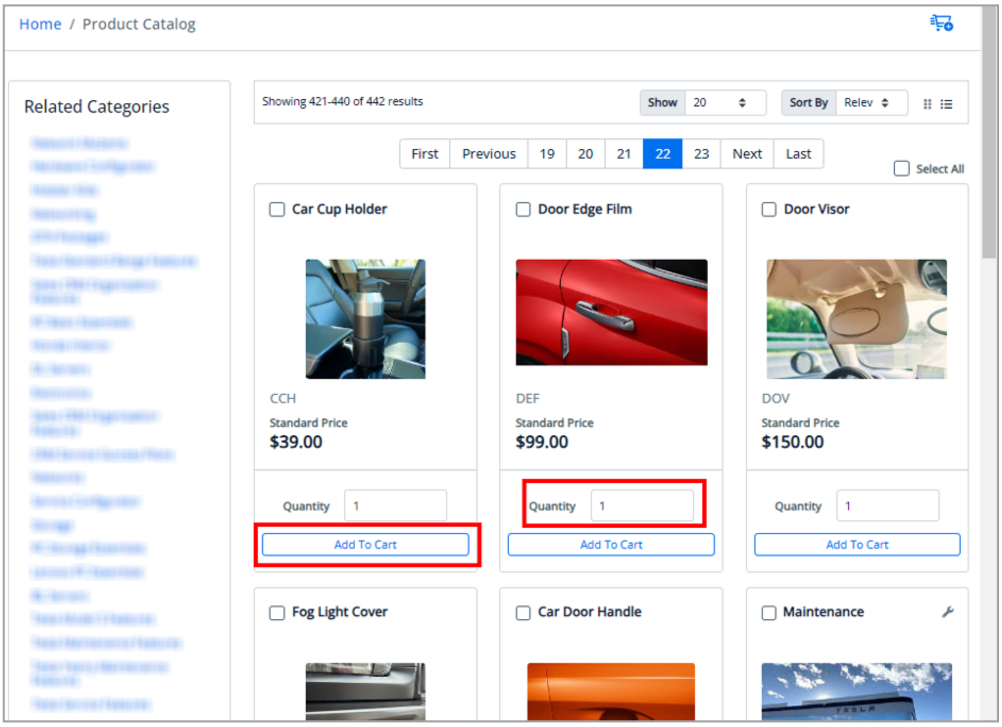
Click the product's name or image to view more information about it, such as its configurations, specifications, features, or pricing.

> The following API with the page, limit, and sort parameters is used to get the product details. For more information, click here.
>
> GET `https://<URL_of_the_Instance>/api/catalog/v1/products/{productId}`
>
> The implementer can also set up a **Based on Pricelist** to cater to geographical or customer-specific adjustment differences of the prices in the catalog. For more information, see Configuring the Price Lists.

Adding product(s) to the cart

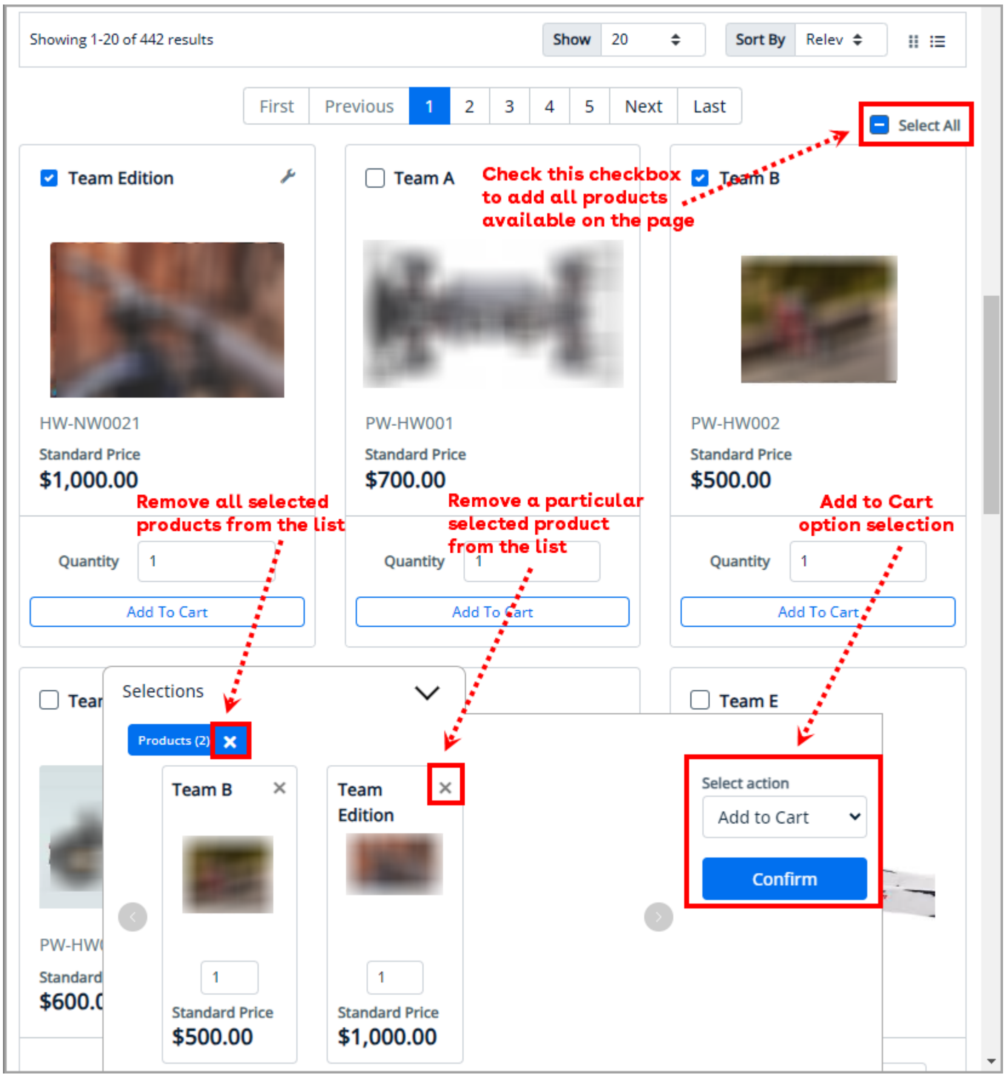
You can add a product or multiple products to your cart for purchase by following any of the following paths. Before adding the product to the cart, you can also specify the quantity in the **Quantity** field.

- Click **Add to Cart** for the particular product.



- Every product card in the catalog has a checkbox beside it. Selecting the checkbox opens a drawer with a list of selected products. You can also use the **Select All** option to select all products displayed on the catalog page (based on the pagination selected per page) or remove some products and then add the rest of the products to the cart. From the **Selection action**, select **Add to Cart** and click **Confirm** to add the selected products to the cart.

> ⓘ Although there is no limit to the number of products that can be added to the cart at once, it is recommended that you add up to 50 items to avoid operations failing or taking too long to finish.



ⓘ The following API is used to add the product to the cart. For more information, click here.

GET https://<URL_of_the_Instance>/api/carts/v1/carts/{cartId}/items

If the price process of the cart takes longer than expected, the application attempts to fetch the cart status again for the number of retry attempts and inter-attempt delay specified in the cart status retry settings. If pricing the cart takes longer, these options are presented:

- **Check Status**: The application retries the cart status fetch, doubling the number of retry attempts specified while configuring cart pricing status retry settings. For example, if you set 5 retry attempts, the application attempts 10 retries.

- **Abandon Cart**: Deactivates the current cart and creates a new one. You can then add the products again into the new cart.

Product Drawer

On the *Product Catalog* page, all the selected products are displayed in the *Product Drawer*. You can also view more information about the product by clicking the product's name or image. You can clone the line items, create a favorite configuration, and compare products as well. For more information, see Cloning Primary Line Items, Managing Favorites, and Comparing Products.

Select one of the following topics for more information on Catalog operation:

- Searching for Products
- Viewing the Product Details
- Comparing Products
- Adding Products to a Cart
- Product Configuration

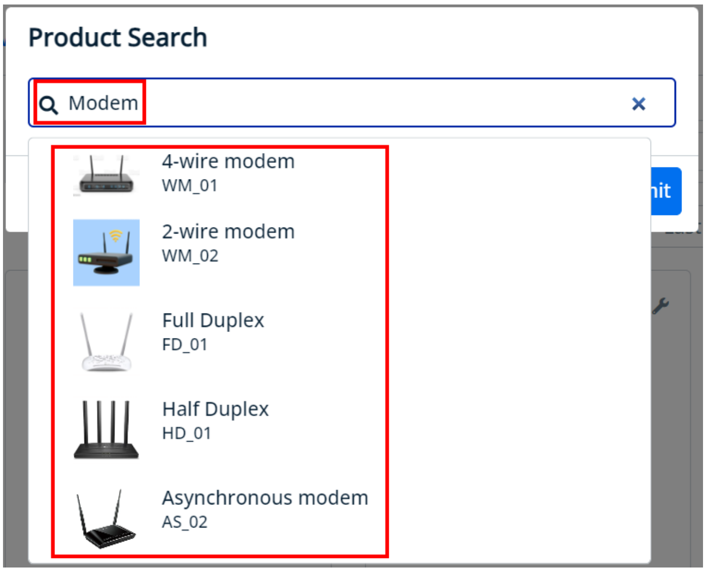
Searching for Products

The **Search** (🔍) icon in the header allows you to quickly search for and select the product you are looking for.

There are two ways you can search for a product.

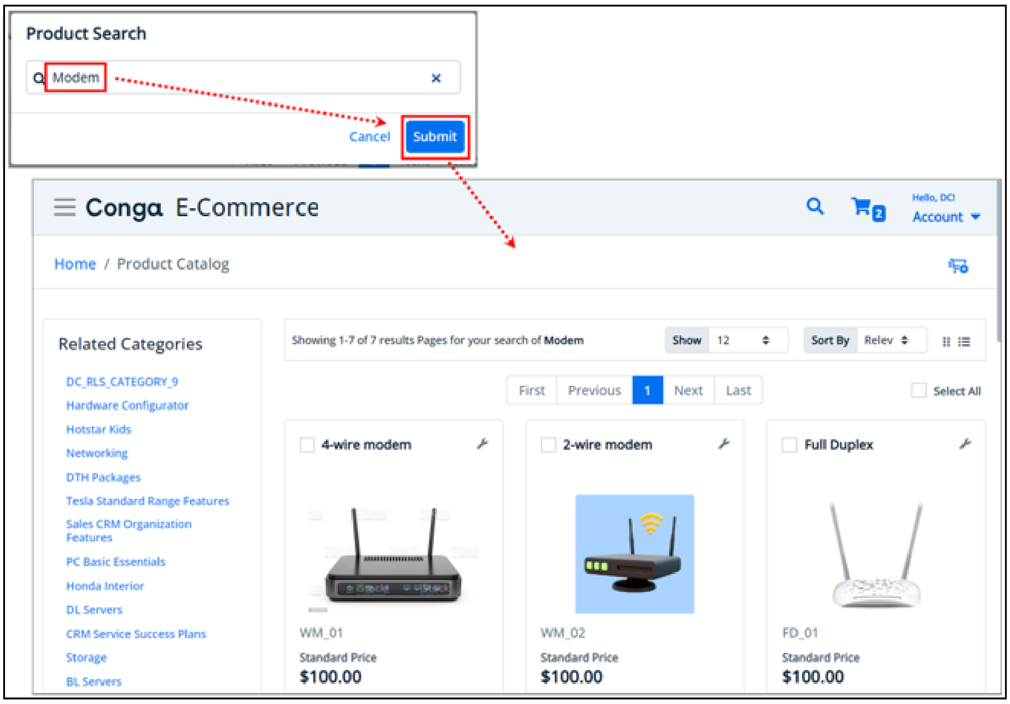
- Click the **Search** icon and use the text search to search and select a product.

  ⓘ The following API is used to get the list of products based on the type-ahead search result, with the query parameter. For more information, click here.
  GET `https://<URL_of_the_Instance>/api/catalog/v1/products/typeahead`
  For example: `https://<URL_of_the_Instance> /api/catalog/v1/products?limit={pageLimit}&query=Home Appliance`



- Click the **Search** icon and enter a few keywords or a whole keyword including space and press **Enter** on your keyboard. A list of products is displayed matching the entire keywords you entered.

> ⓘ The following API is used to get the list of products based on the search result, with the query parameter. For more information, click here.
>
> **GET** https://<URL_of_the_Instance>/api/catalog/v1/products
>
> **For example:** https://<URL_of_the_Instance> /api/catalog/v1/products?query=Home Appliance&page={pageNumber}&limit={pageLimit}



You can select a product from the search results and click **Add to Cart** to add the product to the cart. If a product is configurable, you can configure a product with multiple options or attributes and then add the product configuration to the cart.

Viewing the Product Details

The **Product Details** page shows the product's basic information, attributes, options, and other components. You can access the *Product Details* page from the **Catalog** and **Cart** pages.

If the price process of the cart takes longer than expected, the application attempts to fetch the cart status again for the number of retry attempts and inter-attempt delay specified in the cart status retry settings. If pricing the cart takes longer, these options are presented:

- **Check Status**: The application retries the cart status fetch, doubling the number of retry attempts specified while configuring cart pricing status retry settings. For example, if you set 5 retry attempts, the application attempts 10 retries.
- **Abandon Cart**: Deactivates the current cart and creates a new one. You can then add the products again into the new cart.

Upon navigating away from the product details page having unsaved changes in the cart, a confirmation popup is displayed - "*There are unsaved changes in progress in your configuration. Do you want to discard these changes?*"

> The following API with includes parameters is used for product details.
> GET `https://<URL_of_the_Instance>/api/catalog/v1/products/{productId}`
> **For example**: `https://<URL_of_the_Instance>//api/catalog/v1/products/{productId}?includes=options&includes=attributes&includes=prices&includes=categories`

Standalone Products

Click the product name or image to view the product details.

- **Details tab**: Provide complete information about the details of the product, product images, attachments, and collateral.

- **Specifications tab**: View a list of specifications of a product which refers to the detailed and specific information that outlines its features, characteristics, technical details, and performance metrics. These specifications provide a clear understanding of what the product offers, helping you make informed purchasing decisions based on your needs and preferences. Specifications encompass various aspects such as dimensions, materials, technical components, capabilities, compatibility, and any other relevant details that define the product's attributes and functionalities.

> The following API is used to get the product details. For more information, click here.
> **GET** https://<URL_of_the_Instance>/api/catalog/v1/products/{productId}

> The attachment file types PDF, TXT, RTF, and DOC are supported.

Bundle (Complex) Products

Click the product name or image to view the product details. As per the setup (see the following *Configuration tab* point for more information), you can configure the products, view the final price, and then add them to your cart.

- **Details tab**: Provides complete information about the details of the product, product images, attachments, and collateral.
- **Configuration tab**: View the default product configuration, including attribute rules, constraint rules, and options set by the administrator. You can also search for the specific configuration, and expand & collapse the configuration. When you select an option, option group, or attribute that has validation, inclusion/exclusion, or configuration (min/max) rules set by the administrator, you will see an in-line validation message as well as a page-level validation message that you can review and resolve. For more information, see Product Configuration. You can also see the price details based on your product configuration by clicking the Price Summary button. The implementor configures the product configuration modification behavior for the user. The implementor must set the value of the **EnableDiscoveryOn** field (available in the ConfigSystemProperties) to the **product details page** and **cart item details page.** For example, to enable the product details page/cart item details page behavior, the implementor has to pass the value as `EnableDiscoveryOn: ' ProductDetailsPage' or EnableDiscoveryOn: 'CartItemDetailsPage'`
Use the following API to set the behavior:
PUT https://<URL_of_the_Instance>/api/revenue-admin/v1/flows/{flowname}/

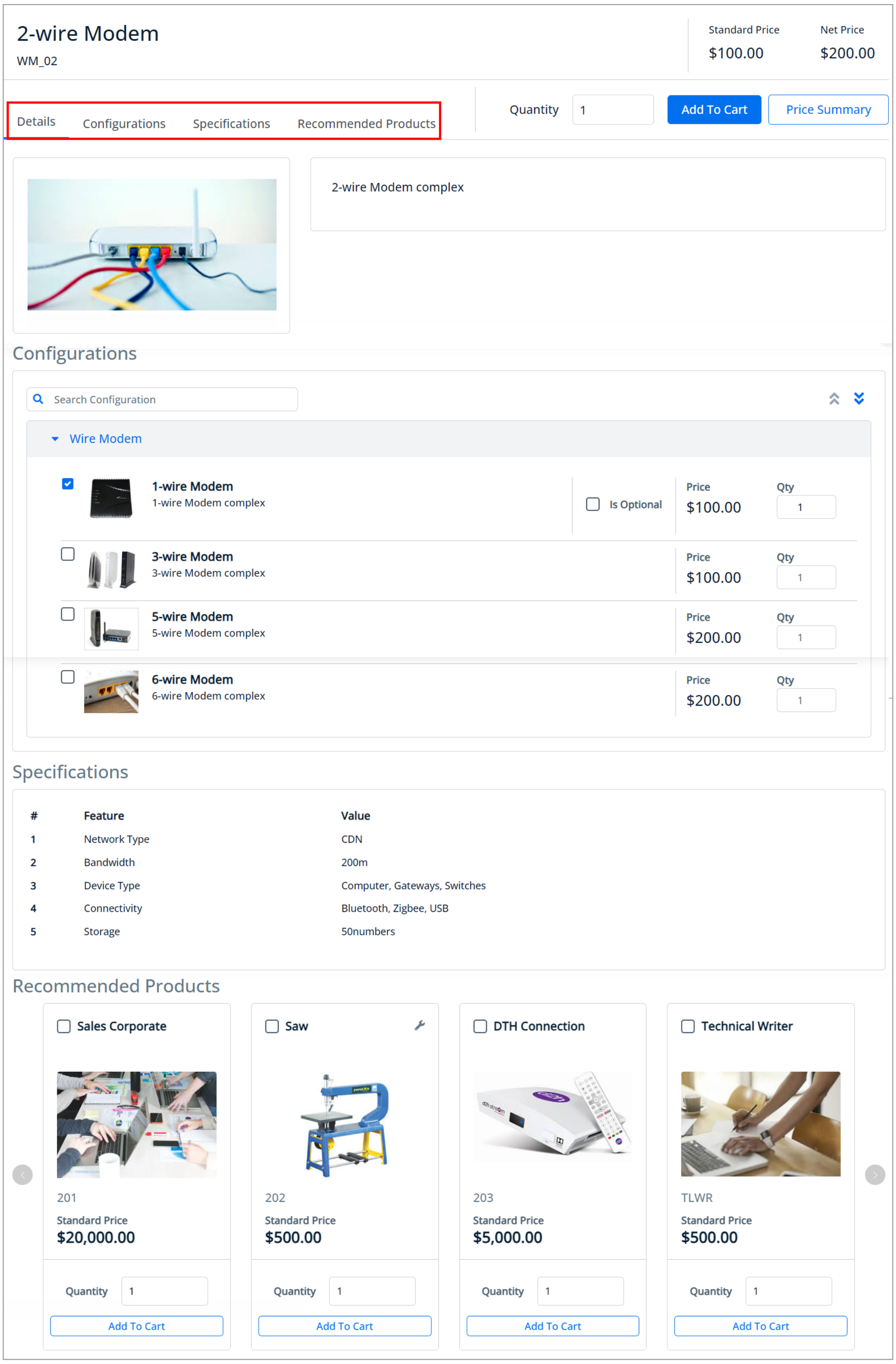
`settings/ConfigSystemProperties`
To understand the meaning of each value, consider the following:

> If the discovery field is not set, then the application defaults to the following behavior:
> **Default Behavior:** The user can not modify any product configuration. To modify the configuration, the user must first add the product with the default configuration to the cart and then modify the product configuration from the cart item details page. Changes made on the cart item details page after adding a product to the cart are automatically reflected in the cart and the pricing summary is also updated.

  - **product details page:** The user can modify the product configuration before adding the product to the cart.
  - **cart item details page:** It works the same as the default behavior for this release. Please refer to the note above for further information.
- **Specifications tab**: View a list of specifications of a product which refers to the detailed and specific information that outlines its features, characteristics, technical details, and performance metrics. These specifications provide a clear understanding of what the product offers, helping you make informed purchasing decisions based on your needs and preferences. Specifications encompass various aspects such as dimensions, materials, technical components, capabilities, compatibility, and any other relevant details that define the product's attributes and functionalities.
- **Recommended Products tab**: View a list of products that the user may like and want to purchase based on the current product selection. The implementor can set the recommendation rule to display the list of recommended products.

> By default, the recommended products feature is enabled. If you do not want to display the recommended products, disable the feature by setting the `EnableProductRecommendation` flag to `false` in the **ConfigSystemProperties**. Use the following API to disable the flag. For more information, click here.
> **PUT** `https://<URL_of_the_Instance>/api/revenue-admin/v1/flows/{flowname}/settings/ConfigSystemProperties`

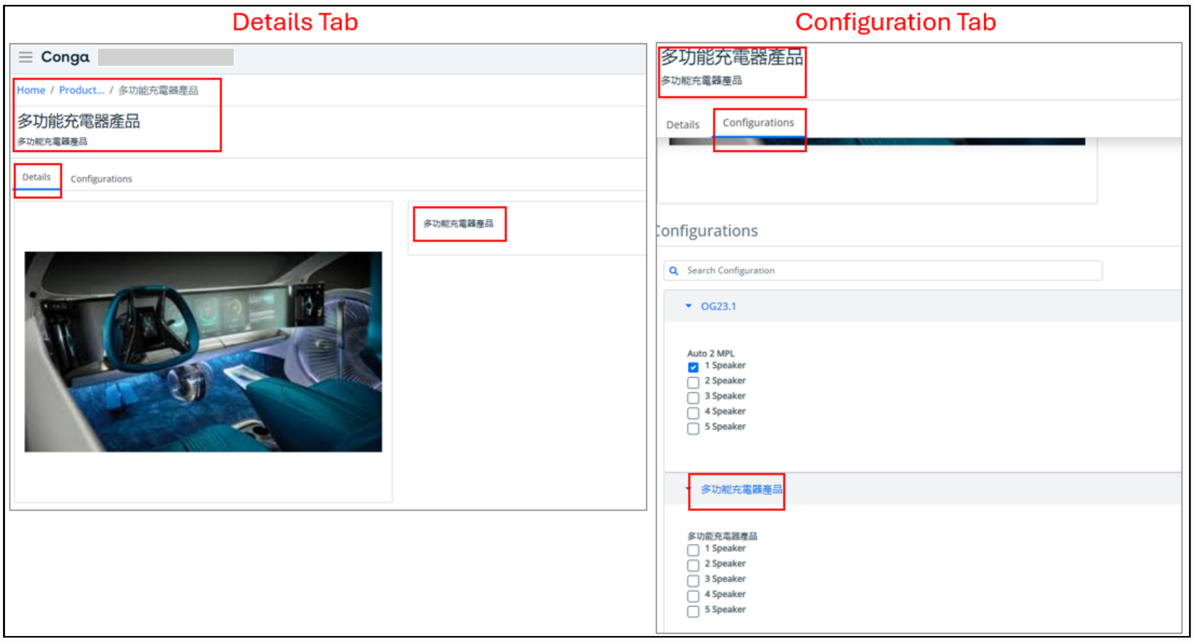
- **Price Summary button**: View the price summary for the selected product's configuration including option quantity and price.
- **Add to Cart button**: Add the product to the cart.
- **Update Quantity button**: Change the quantity and click this button to update the same in the cart. When you have already added the product to your cart, this button will be available.


2-wire Modem
WM_02
Standard Price
$100.00
Net Price
$200.00
Details
Configurations
Specifications
Recommended Products
Quantity
1
Add To Cart
Price Summary
2-wire Modem complex
Configurations
Search Configuration
Wire Modem
1-wire Modem
1-wire Modem complex
Is Optional
Price
$100.00
Qty
1
3-wire Modem
3-wire Modem complex
Price
$100.00
Qty
1
5-wire Modem
5-wire Modem complex
Price
$200.00
Qty
1
6-wire Modem
6-wire Modem complex
Price
$200.00
Qty
1
Specifications
Feature Value
1 Network Type CDN
2 Bandwidth 200m
3 Device Type Computer, Gateways, Switches
4 Connectivity Bluetooth, Zigbee, USB
5 Storage 50numbers
Recommended Products
Sales Corporate
201
Standard Price
$20,000.00
Quantity 1
Add To Cart
Saw
202
Standard Price
$500.00
Quantity 1
Add To Cart
DTH Connection
203
Standard Price
$5,000.00
Quantity 1
Add To Cart
Technical Writer
TLWR
Standard Price
$500.00
Quantity 1
Add To Cart

ⓘ Data translation in Catalog allows you to display modules and elements as per preferences and locales. Currently, data translation is available for the Catalog and its modules (Product, Category, OptionGroup, Attribute, and AttributeGroup), as well as elements (product names, line item fields, categories, and rule messages). For more information, see Setting Up Multi-language Support.

Example:

When you set the catalog's locale to Chinese, it displays product details, categories, and other elements in Chinese.



Comparing Products

Product comparison allows you to compare the features and specifications of multiple products on a single page, making it easier to make an informed purchasing decision. You can select more than one product and compare product features in the catalog. A page appears listing the selected products and their features in a tabular form for you to review, compare, and make your decision to purchase. You can also add the product to the cart directly from the comparison page.

Benefits of Product Comparison:

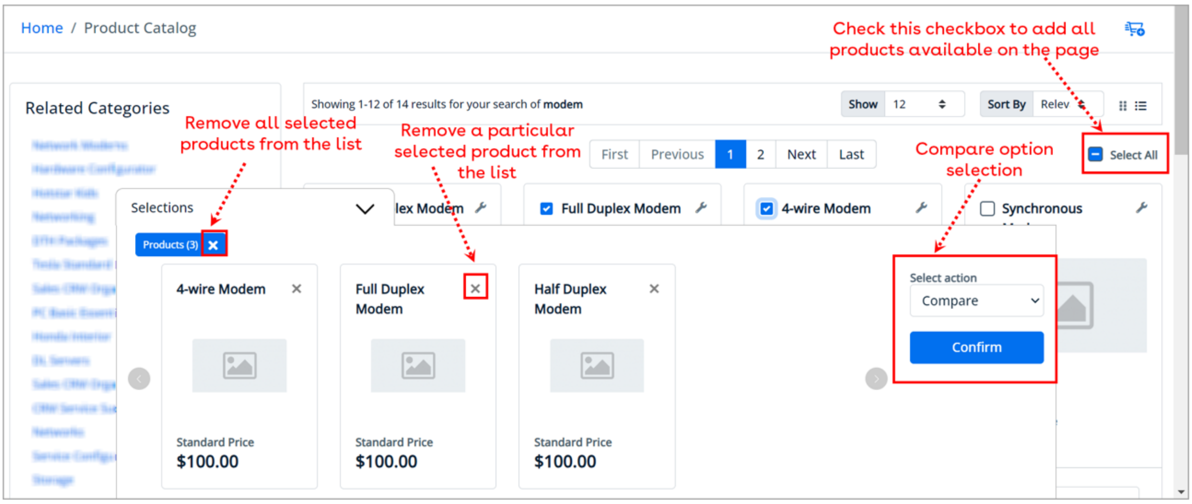
1. **Efficient Decision Making**: The side-by-side comparison makes it easy to identify key differences between products, aiding in quicker decision-making.
2. **Informed Purchasing**: You can see the features and details of multiple products at once, ensuring you are well informed about your options before making a purchase.

3. **Time-Saving**: Instead of navigating back and forth between product pages, you can quickly assess different products on a single page.
4. **Customization and Personalization**: You can find products that best match your preferences and needs, ultimately leading to a more satisfying shopping experience.

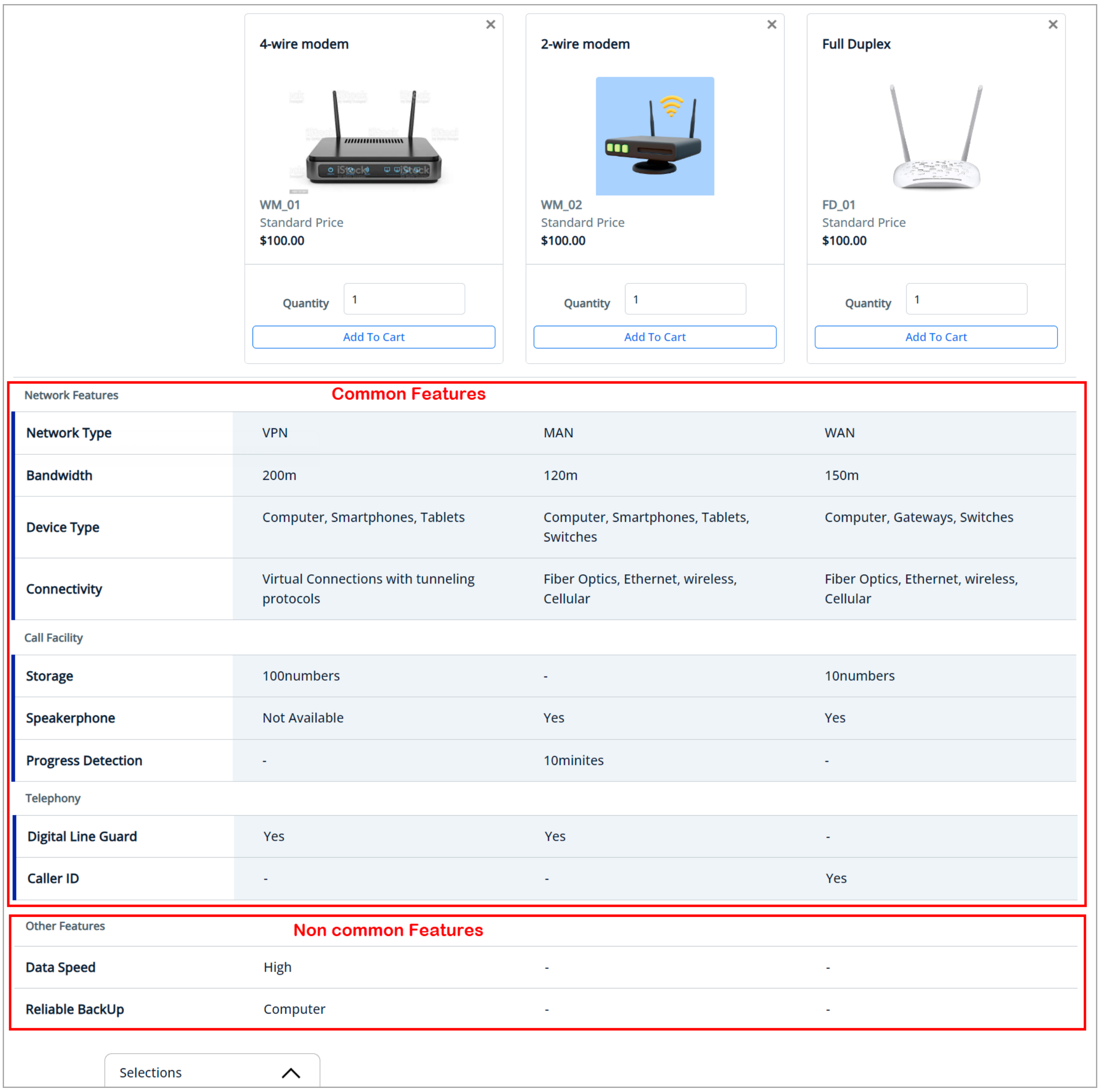
Compare Products

Every product card on the Catalog has a checkbox beside it. Selecting the checkbox opens a drawer with a list of selected products. From the **Selection action**, select **Compare** and click **Confirm** to review, compare, finalize your product, and add to the cart directly from the Compare Products screen. You can remove the product from the compare list by clicking the **Remove** (✕) icon.

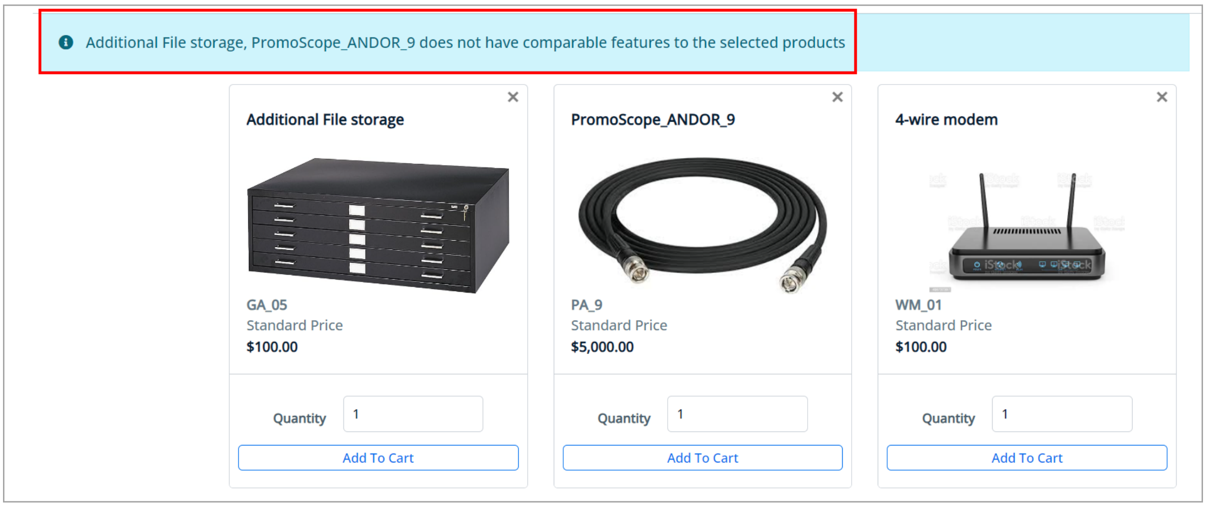
- Although there is no limitation on the number of products for comparison, it is advisable to limit the number to no more than 15 to avoid operations failing or taking too long to finish, as well as the difficulty of visually comparing too many products at once.
- **Select All** checkbox is only available on tablets and desktops to perform bulk operation.
- **Compare** feature is available on tablets and desktops due to higher resolution requirements.



All the common features are displayed together based on the feature category-wise with a blue color border. The other features that are not common across all the selected products are displayed separately at the end of the list.



If none of the selected items share any common features, the system will display a warning message with a list of products that have nothing in common with each other.



The following API is used to compare selected products.

POST https://<URL_of_the_Instance>/api/catalog/v1/products/compare

Adding Products to a Cart

While browsing the catalog, you may decide to purchase one or more products. You can add those items to your cart and come back later to see all of your cart items.

The application displays the **Buy Another** action for *asset products*, which is similar to the **Add to Cart** button. Whether you use the Add to Cart button or the Buy Another action, the steps for adding products remain the same.

Standalone Product(s)

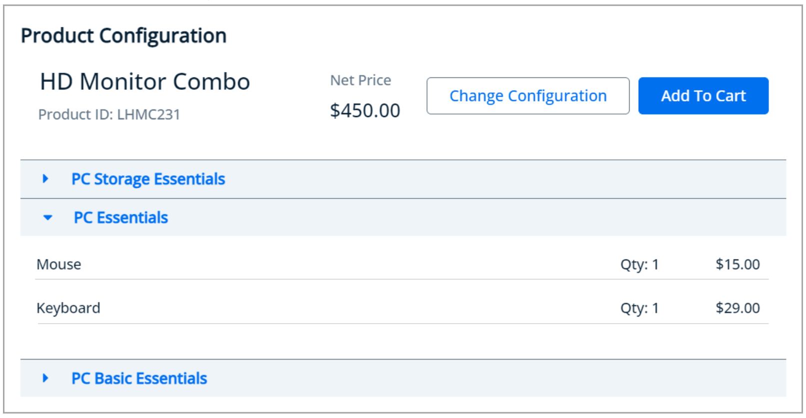
- On the catalog page, click the **Add To Cart** button for the product you want to purchase. You can also click the product image to see the product details and add the product to the cart. If a recommendation rule is set for the selected product, the Recommended Products tab appears next to the Details tab, which displays a list of recommended products, and you can add recommended products directly from the list.
- Every product card in the catalog has a checkbox beside it. Selecting the checkbox opens a drawer with a list of selected products. You can also use the **Select All** option to select all products displayed on the catalog page or remove some products and then add the rest of the products to the cart. From the **Selection action**, select **Add to Cart** and click **Confirm** to add the selected products to the cart.

> ⓘ Although there is no limit to the number of products that can be added to the cart at once, it is recommended that you add up to 50 items to avoid operations failing or taking too long to finish.

Complex Product(s)

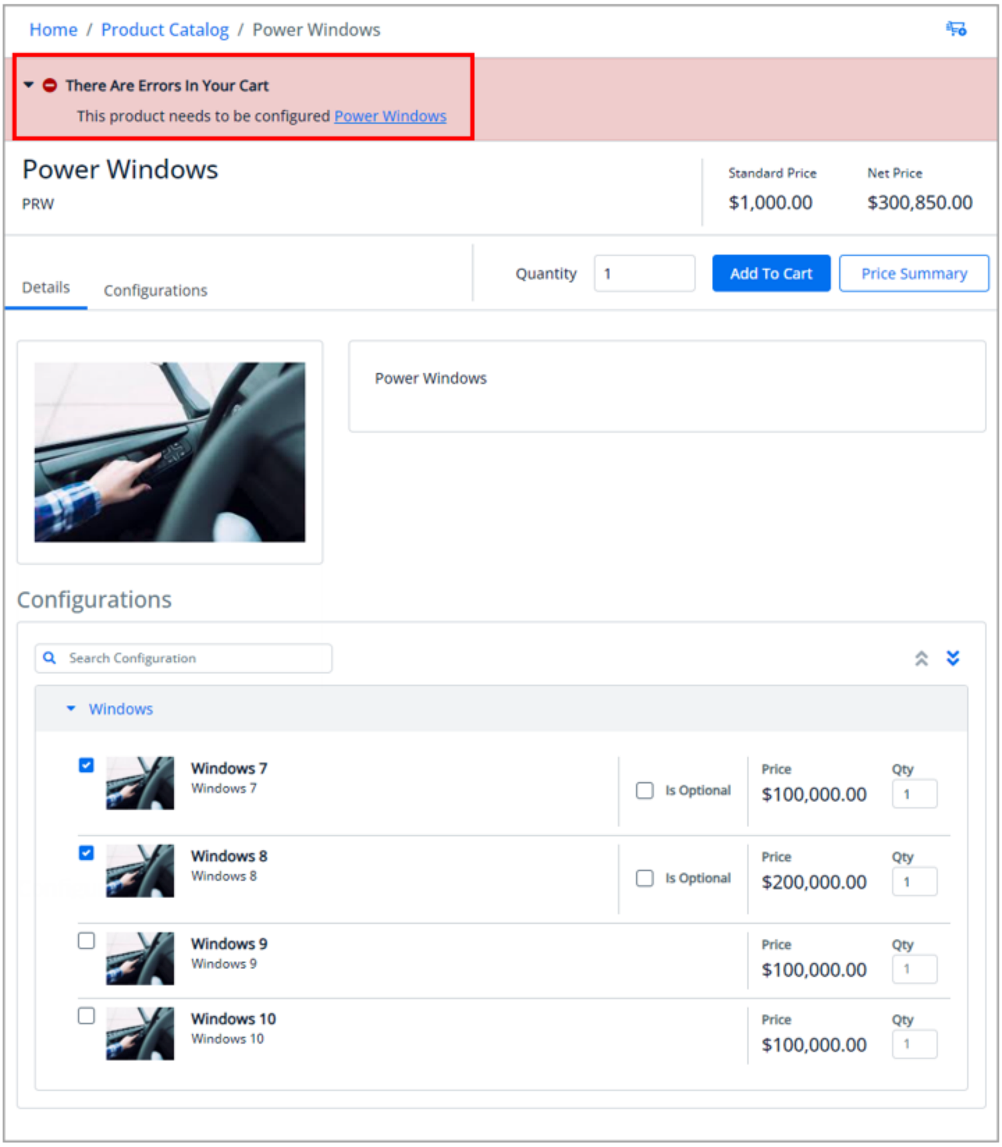
- If the `IsCustomizable` flag is set to `false` for the selected product, you can see the Add to Cart button on the product catalog page. Click the **Add To Cart** button. It takes you to the Product Configuration pop-up.
  - Click the **Change Configuration** button to change the product configuration. It will first add the product with default options (if any) to the cart before navigating to the Product Details page to make a configuration change **or** click the **Add To Cart** button to directly add the product to the cart.

If a recommendation rule is set for the selected product, you can see the **Recommended Products** tab next to the **Configuration** tab that displays a list of recommended products, and you can add recommended products directly from the list.

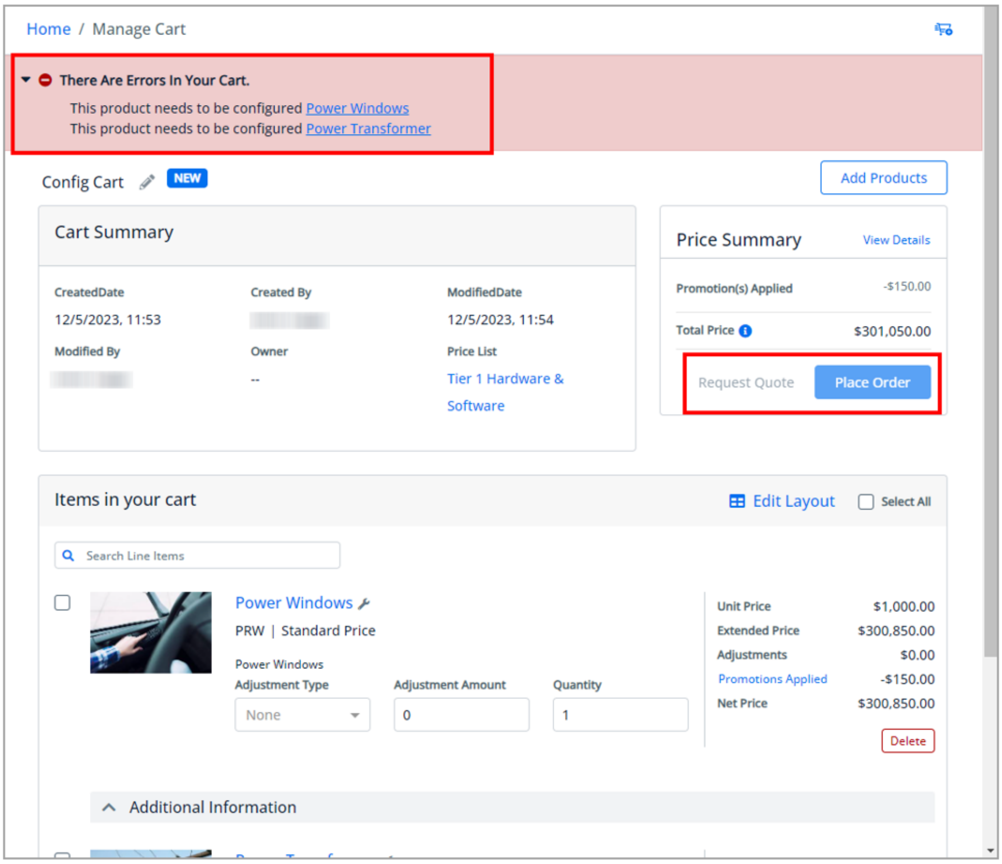


- If the `IsCustomizable` flag is set to `true` for the selected product, you can see the Add to Cart button on the product catalog page. Click the **Configure** button. It takes you to the Product Configuration pop-up.
  - Click the **Change Configuration** button. It takes you to the product details page. If necessary, modify the product configuration before clicking the **Add To Cart** button to add the product to the cart. The following error message can also be seen on the product details page, notifying you to review the product

configuration before adding it to the cart.



- Every product card in the catalog has a checkbox beside it. Selecting the checkbox opens a drawer with a list of selected products. You can also use the **Select All** option to select all products displayed on the catalog page or remove some products and then add the rest of the products to the cart. From the **Selection action**, select **Add to Cart** and click **Confirm** to add the selected products to the cart.
  If you add multiple products together in the cart for which the `IsCustomizable` flag is set to `true`, you can see the error message on the cart details and other pages. You can not request a quote or place an order without resolving the error. You can click the error message to see the product-specific configuration error along with the link. By clicking the link, you will be directed to the product details page where you can change the configuration.



Although there is no limit to the number of products that can be added to the cart at once, it is recommended that you add up to 50 items to avoid operations failing or taking too long to finish.

You can choose as many products to be added to the cart.

When you click the *Add to Cart* button, the following API call is used to add the product to the cart. For more information, click here.

POST `https://{{baseurl}}/api/cart/v1/carts/{cartId}/items`

If the price process of the cart takes longer than expected, the application attempts to fetch the cart status again for the number of retry attempts and inter-attempt delay specified in the cart status retry settings. If pricing the cart takes longer, these options are presented:

- **Check Status**: The application retries the cart status fetch, doubling the number of retry attempts specified while configuring cart pricing status retry settings. For example, if you set 5 retry attempts, the application attempts 10 retries.

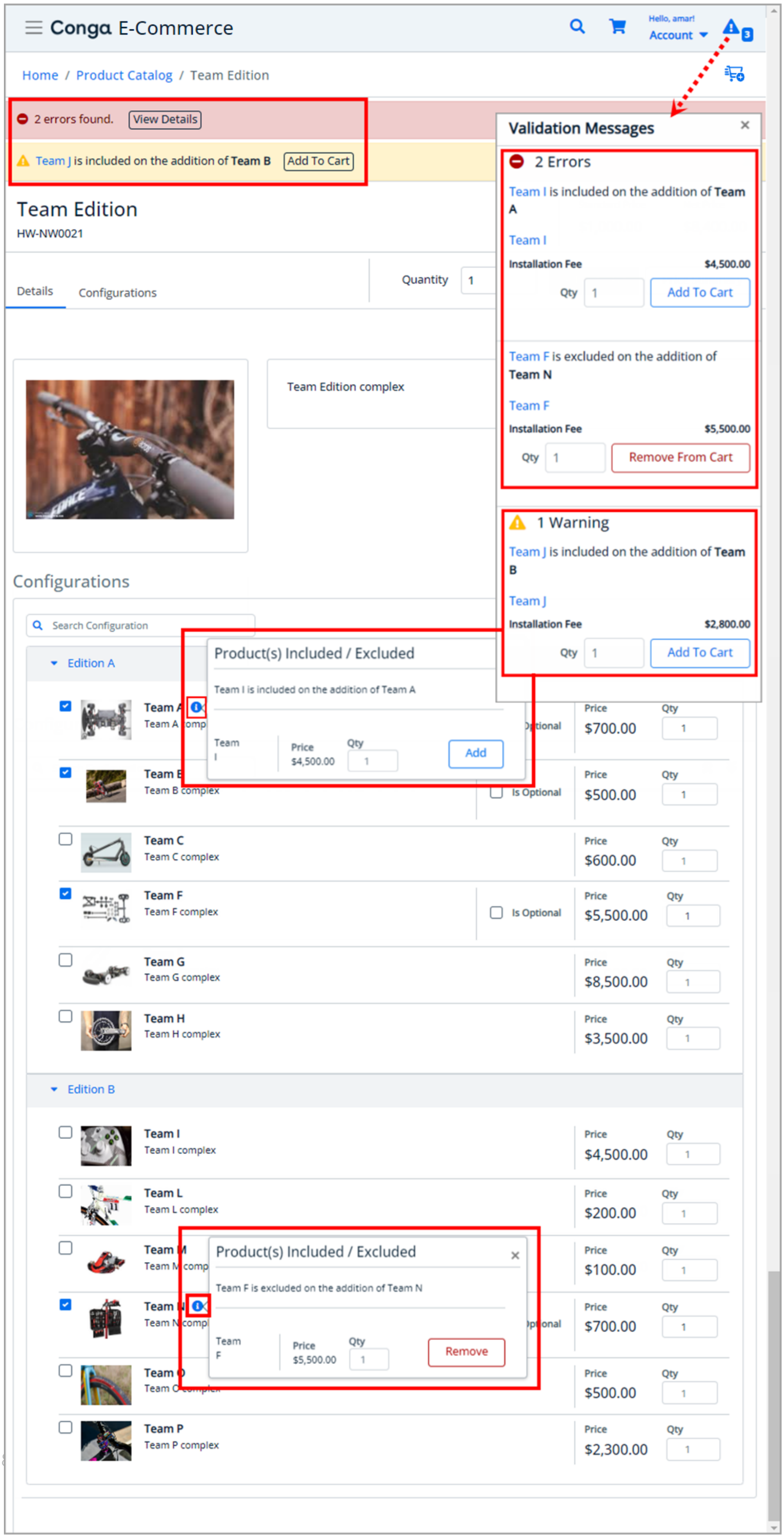
- **Abandon Cart**: Deactivates the current cart and creates a new one. You can then add the products again into the new cart.

The product is added to the cart and you can view the complete list of products in the mini cart by clicking the cart icon on the top right. If you have products selected, this icon displays the number of products added.

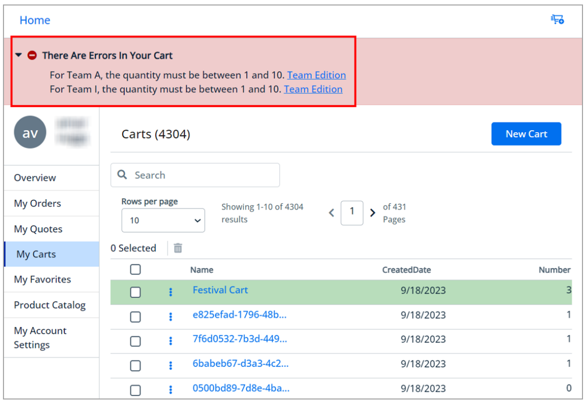
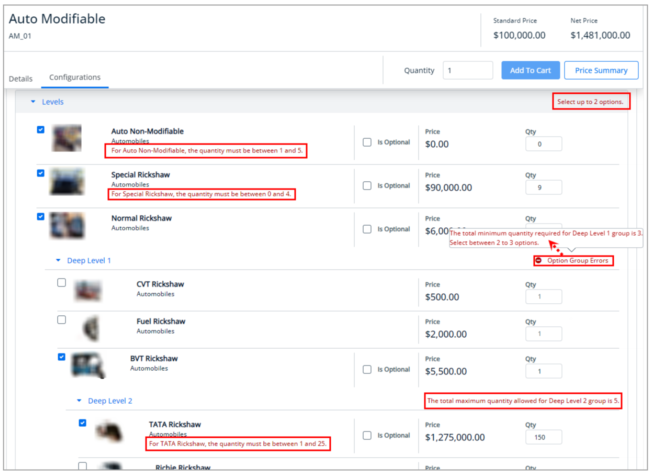
When you select or add any product to the cart with validation, inclusion/exclusion, or configuration (min/max) rules:

- For validation and inclusion/exclusion rule: You will see the in-line (popup) and page level validation message and an alert icon with the number of warnings/errors next to the mini cart icon. You can review the validation message and add/remove the suggested product.
- For configuration (min/max) rule: You will see the error message on the cart and other pages with the product link and detailed option and option group level errors on the product configuration section. If there is more than one error at option group level, you can click the error and see the list of errors in the popup.

Validation and Inclusion/Exclusion Error


Conga E-Commerce
Hello, amar!
Account
Home / Product Catalog / Team Edition
2 errors found. View Details
Team J is included on the addition of Team B Add To Cart
Team Edition
HW-NW0021
Details
Configurations
Quantity 1
Team Edition complex
Configurations
Search Configuration
Edition A
Product(s) Included / Excluded
Team I is included on the addition of Team A
Team I
Price $4,500.00
Qty 1
Add
Team A
Team A complex
Is Optional
Price $700.00
Team B
Team B complex
Is Optional
Price $500.00
Team C
Team C complex
Price $600.00
Team F
Team F complex
Is Optional
Price $5,500.00
Team G
Team G complex
Price $8,500.00
Team H
Team H complex
Price $3,500.00
Edition B
Team I
Team I complex
Price $4,500.00
Team L
Team L complex
Price $200.00
Product(s) Included / Excluded
Team F is excluded on the addition of Team N
Team F
Price $5,500.00
Qty 1
Remove
Team M
Team M complex
Price $100.00
Team N
Team N complex
Price $700.00
Team O
Team O complex
Price $500.00
Team P
Team P complex
Price $2,300.00
Validation Messages
2 Errors
Team I is included on the addition of Team A
Team I
Installation Fee $4,500.00
Qty 1
Add To Cart
Team F is excluded on the addition of Team N
Team F
Installation Fee $5,500.00
Qty 1
Remove From Cart
1 Warning
Team J is included on the addition of Team B
Team J
Installation Fee $2,800.00
Qty 1
Add To Cart

Configuration Error

<table>
<tr><th>Cart and Other Page</th><th>Product Configuration Page</th></tr>
<tr><td>
</td><td>
</td></tr>
</table>

Product Configuration

You can reconfigure any attributes or options associated with your products from the *Product Details > Configuration* tab.

> ⓘ The Attribute Rules and Attribute Value Matrix feature settings are stored under Configuration Management using `"Category": "cpq"`, and `"Name": "<EnableAttributeMatrix or EnableAttributeRule>"` and they are set to `true` by default. Use the `PUT /api/config-management/v1/configurations` API to enable or disable the feature setting.

Product Attribute Rules

Product Attribute Rules allow product configuration according to product attributes that are based on the actions you select. Each attribute value selection should ensure that the rest of the attributes get constrained to allow only valid selections to help narrow the result set. The attributes can also leverage expressions and calculations to derive values that help identify the product variant. This feature simplifies the configuration process, eliminates the need for component-level choices, and provides guided selling at the product configuration level. You can also set multiple actions for the same product attribute rule.

The product attribute rule is applied to the criteria that you define with the Criteria scope type. You can define simple and advanced criteria. In simple criteria, you can select a field, operator, and value. In advanced criteria, you can set a condition, if it is true, then the actions in the Action section are triggered.

Scenario to Use Product Attribute Rules with Criteria

Product Attribute Rule (PAR) effective date based on quote dates
When the effective date of the quote on the product configuration page fulfils the PAR criteria that you defined, a Rule gets executed.
For example,
Rule Criteria: Apply rules where,
Rule Start Date <= Quote Expected Start Date AND Rule End Date >= Quote Expected End Date Date

You can configure product attribute rules for attributes with the following action types and have them displayed on the product details page.

Action Type	Data Type Supported	Description
Allow	• Picklist • Multi-picklist	To restrict the visibility of values on the target field.
Default	• Number • Text • Picklist • Multi-picklist	To add a default value on the target attribute.
Hidden		To hide the target attribute.
Disabled		To make the target attribute a read-only field.
Required		To make the target attribute a required field.
Reset		To auto-populate a default value on the target attribute if the field is left blank.

For more information, see Attributes Based Configuration Rules.

Attribute Value Matrix

You can configure the attribute value matrix with the following application types and have them displayed on the product details page.

> ⓘ The scope must be Product, Product Family, and Product Group.

- **Default** - Enables you to select the picklist and multi-picklist values, which you have configured as default values in Matrix View.
- **Constraint** - Enables you to select only those picklist and multi-picklist values, which you have configured in Matrix View. All the other values are not visible in the drop-down list. This also works with the multi-select picklist.
- **Force Set** - Enables you to automatically set the picklist and multi-picklist values, which you have configured in Matrix View (considering the last user selection). As soon as you change the attribute value for one attribute, the system sets values for other attributes.

For more information, see Attributes Based Configuration Rules.

Option Configuration

When you open the **Product Details** page > **Configuration** tab, the minimum and maximum options configuration and default option quantities work at all levels of option groups. Also, the minimum and maximum product quantity and total quantity validation work for 6 levels of option groups and you can also see option group and option level validation messages.

Display Option(s) as a Picklist

The implementor can set the **Is Picklist** flag when you want to display your options in the form of a picklist, from which the user can select only one option. When you set this flag, ensure that Min Options and Max Options are set to 1.

Hide Option Groups and Option

The implementor can completely hide (refer to the following points) an option group and its options within it from the user interface for the user.

- Use the **Is Hidden** flag from the *Option Group Configuration* page to hide option groups.
- Use the exclusion type constraint rules to hide excluded options from the list.

Modify Option Groups and Options within a Bundle Configuration

The implementor can specify whether the user can change the option quantity for the option group using the **Modifiable Type** setting with values **Fixed** and **Variable** from the *Option Group Configuration > Bundle Configuration*.

- Selecting Variable enables the user to change the quantity of the option products while configuring the product.
- Selecting Fixed restricts the user from changing the quantity of the option products inside the parent option group.

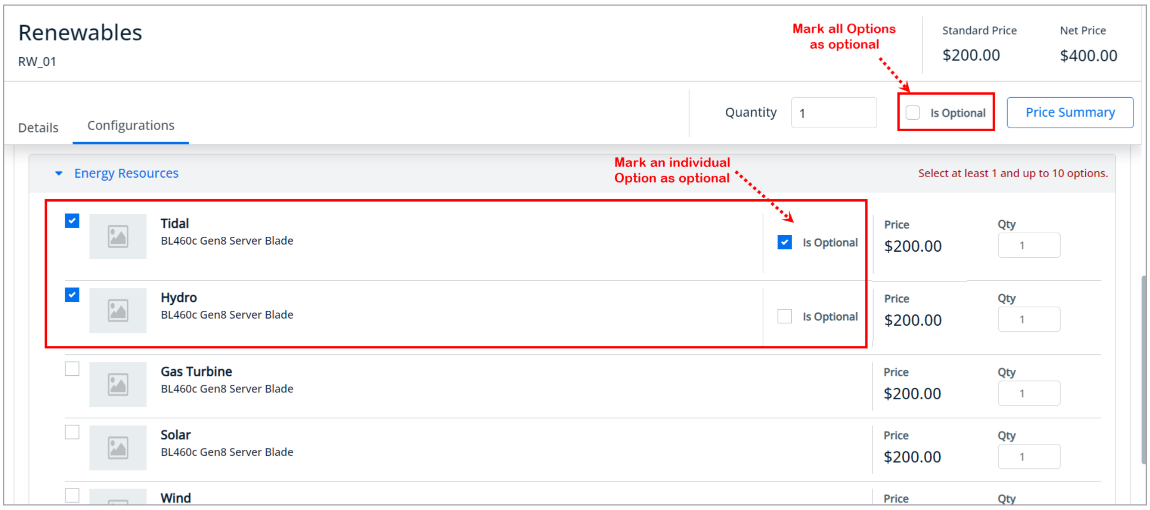
Setting the modifiable type setting to Fixed or Variable impacts only on immediate options. There is no impact on the sub-option groups. This setting has to be done on each level. This also overrides minimum and maximum validation. In case you select an option group with Modifiable Type as Fixed, the quantity input box of the immediate option(s) is disabled, and clicking the info icon next to it displays a message *Quantity is not modifiable*. The quantity displayed is the default value and in case you do not set the default value, the quantity is 1.

Set Required Option(s)

The implementor can set the Required flag for an option product in CPQ. The required option product is selected by default in the configuration, and if the user deselects the option product, the *Add to Cart* button will be disabled.

Exclude Option Product within a Bundle Configuration

The implementor can set the *Exclude Options Products* custom setting in CPQ Admin to exclude options that are marked optional from the min/max criteria validation of the option group. When the user marks the option as optional using the **Is Optional** checkbox, options as optional are not considered in the **Min Options**, **Max Options**, **Min Total Quantity**, and **Max Total Quantity** criteria. Whenever you mark any product as optional, the price of the product is not included in the total. If you mark an option in a bundle as optional, the price of that option is not included in the bundle price.



- Attribute Based Configuration Rules
- Revalidating the Product Configuration
- Managing Constraint Rules

Attribute Based Configuration Rules

Attribute-Based Configuration helps you customize the product configuration on your cart on the basis of the selection of product attributes. The attributes define characteristics or the desired features of the product. The attribute configuration may or may not affect the price of the product. Each attribute value selection ensures that the rest of the attributes get filtered based on selected attributes and the result set is narrowed.

The Attribute Rules and Attribute Value Matrix feature settings are stored under Configuration Management using `"Category": "cpq"`, and `"Name": "<EnableAttributeMatrix or EnableAttributeRule>"` and they are set to `true` by default. Use the `PUT /api/config-management/v1/configurations` API to enable or disable the feature setting. For more information on how to set up and manage Attribute Rules and Attribute Rule Actions using REST APIs, see Catalog Setup APIs.

Attribute Rules

You can execute the Attribute rules on the template for standalone products and bundles with attributes. This enables you to select the right configuration.

You can use one or more of the following Attribute Rules:

- Attribute Rules for Standalone products with attributes
- Attribute Rules for Bundle level attributes
- Attribute Rules for Bundle Option level attributes

The scope types for Attribute-Based Configuration Rules are:

- Product Family
- Product Group
- Product
- Criteria

The action types (constraint type) for Attribute-Based Configuration Rules are:

Action Type	Data Type Supported	Description
Allow	• Picklist • Multi-picklist	To restrict the visibility of values on the target field.
Default	• Number • Text • Picklist • Multi-picklist	To add a default value on the target attribute.
Hidden		To hide the target attribute.
Disabled		To make the target attribute a read-only field.
Required		To make the target attribute a required field.
Reset		To auto-populate a default value on the target attribute if the field is left blank.

Attribute Value Matrix

You can execute the Attribute Matrix-based constraint rules on the template for Standalone products and bundles with attributes. This enables you to select the right configuration.

For example, ABC IT Company, a leading laptop manufacturer, wants to use attributes to drive the product selection of their users. A laptop has five attributes: Color, HDD, RAM, Screen Size, and Fingerprint Reader. The following table describes the products and its attributes.

Product	A-560	A-560m	A-440	A-440m	A-320	A-320m
Color	Black	Black	White	White	Black	White
HDD	1 TB	2 TB	500 MB	500 MB	1 TB	1 TB
RAM	8	16	4	8	8	16
Screen Size	14 HD	14 HD	15	15 HD	14	14 HD
Fingerprint Reader	Yes	Yes	Yes	Yes	No	Yes

After you create an attribute value matrix, when the user selects Black from the Color picklist menu, the HDD picklist menu will contain only 1 TB and 2 TB as options. RAM picklist menu will contain 8 and 16 as options. Screen Size will contain 14 and 14 HD as options. The Fingerprint Reader picklist menu will contain Yes and No as options.

You can use one or more of the following Attribute Value Matrix criteria:

- Attribute Value Matrix for Standalone product with attributes
- Attribute Value Matrix for Bundle level attributes
- Attribute Value Matrix for Bundle Option level attributes

- Product Family
- Product Group
- Product

- Default: Sets the default value of an attribute when criteria are met and the user selects the attributes
- Constraint: Restricts picklist, Multi-picklist values of attributes based on the matrix
- ForceSet: Sets single or multiple values of the attributes based on the matrix

The scope type for Attribute Value Matrix is:The application type for Attribute Value Matrix is:

Revalidating the Product Configuration

You can revalidate your saved cart and quote for the product structure changes. Saved carts and quotes created in the past might have a product for which the structure or rule has been changed. This can affect the validity of a cart or quote when you re-open the configuration. Revalidation includes changes to the product structure, such as the addition or deletion of options. When you open a saved cart, the application shows a message informing you that there are changes to the products in the cart that must be revalidated.

> **Prerequisite**
>
> To use this functionality, the implementer must set the **EnableCartRevalidation** flag available in the ConfigSystemProperties. Use the following API to enable the flag. For more information, click here.
>
> **PUT** `https://<URL_of_the_Instance>/api/revenue-admin/v1/flows/{flowname}/settings/ConfigSystemProperties`

Revalidation is of the following types, depending on the changes made to the product:

- **Hard:** Hard revalidation is considered when a product version is changed incrementally with a higher digit. For example, from 0 to 1, 0 to 2, or 1.4 to 2.3
- **Soft:** Soft revalidation is an incremental or decremental change in the version number. Consider the following:
  - If a Pricelist is deactivated, expired, or deleted
  - Any pricing changes without product version change
  - A product version change from 0 to 0.1, 2.0 to 2.1, or 3.1 to 3.5

The following table describes the changes and type of revalidation action you must perform.

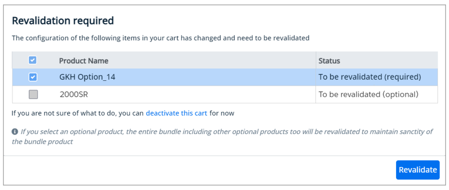
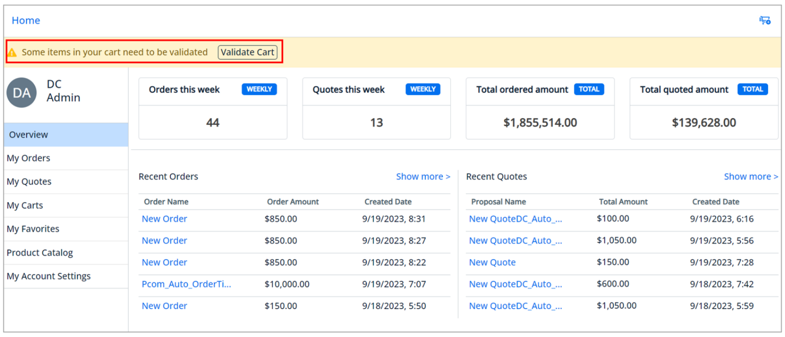
Change	Revalidation Type	Notes
Major product version change	Hard	For example, changing the Product Version from 1.00 to 2.00
Minor product version change	Soft	For example, changing the Product Version from 1.00 to 1.01
Inactive product	Soft	For products that are not active after saving the cart or quote, the application automatically deactivates the price list item and displays a message on the cart. When you revalidate, the application removes the product from the cart.
Inactive price list Item	Soft	
Expired price list Item	Soft	

Change	Revalidation Type	Notes
Deleted price list Item	Soft	
New price list item	NA	The application does not detect new price list items automatically. You must force pricing for that line item to see the new prices. For example, updating quantity.
Changed List Price in the price list item	NA	You must not change the List Price in a live price list item. Conga recommends creating a new price list item and discarding the old price list item

When an Admin changes the Product Configuration and updates the Version field of the product, you see the Revalidation popup (for both hard and soft revalidation) or a revalidation message (for just soft revalidation) with the revalidate cart link upon any of the following action:

- Reload the application
- Switch the cart
- Cart actions (Add or Delete line items)
- Edit quote or order

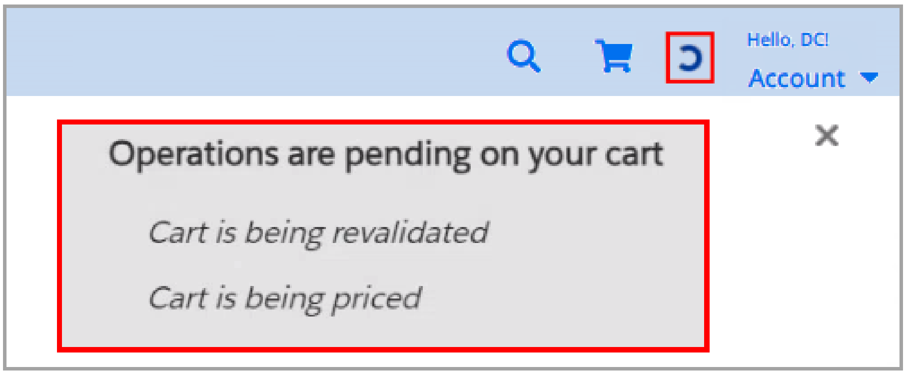
> The changes that require hard revalidation are automatically selected in the Revalidation popup. You cannot deselect those changes; however, soft revalidation changes can be selected as needed.

<table>
<tr><th>Revalidation Popup</th><th>Revalidation Link</th></tr>
<tr><td>
</td>
<td>

When you click the Validate Cart button, the revalidation popup appears, from which you can choose and revalidate all of the changes.</td></tr>
</table>

Click the **Revalidate** button to start the revalidation process. You can see a message (see the image below) for the pending operations on the page and a progress bar next to the mini cart icon. The following operations (buttons and fields) are disabled on the active cart until the revalidation process is completed.

- Add to Cart
- Update Cart
- Request Quote
- Place Order
- Cart Page Fields
- Configuration Page Actions



Managing Constraint Rules

Constraint Rules are configuration rules that are applied during the ordering process to a product or set of products. Constraint rules are set up to conditionally add a product to an order or conditionally block product additions to an order. It is supported for the standalone, bundle, and options products for basic inclusion and exclusion rules.

For example, when Product A is added to the cart, Product B may be automatically added based on an auto-inclusion type rule. Similarly, when Product B is added, users may be prevented from adding Product C.

In a Constraint Rules criteria, you can set up multiple AND or OR or a Combination of AND and OR conditions, including a bundle in any of the conditions. You can associate an option with a bundle along with **Match in Options**, **Match in Primary** (in the case of bundles), or both. Inclusion and Exclusion rules are also supported. **For example**, if [Option A] AND [Bundle X] (Parent Bundle] THEN AUTO INCLUDE [Option B].

When you open the *Product Details,* click *Add to Cart*, or select any *option* and *option groups*, the application triggers the constraint rule for the default product configuration. When you select an option, option groups, or add any product to the cart that has validation or inclusion/exclusion rules, you will see the in-line (popup) and page-level validation message and an alert icon with the number of warnings/errors next to the mini cart icon. You can review the validation message and add/remove the suggested product. You can also see the line item level validation message and disable action when the buyer selects or deselects the **option group** and/or **option** within the option group.

For more information, see Creating a Constraint Rule and Configuring a Constraint Rule Using the Advanced Rule Setup.

This section provides information on working with constraint rules.

- Working with Inclusion Rules
- Working with Exclusion Rules
- Working with Recommendation Rule
- Working with Replacement Rule

Working with Inclusion Rules

The inclusion rule allows specific products to be automatically selected based on defined criteria or product scope specifications. You must create an inclusion rule in CPQ and publish it to use in the commerce platform. For more information, see Creating a Constraint Rule and Configuring a Constraint Rule Using the Advanced Rule Setup.

The following are the supported **action intent** and **product types** for the scope **Product, Product Group** (which has both standalone and bundle products), **Criteria, Field Set,** and **Product Family**:

1) Auto Include

- Standalone → Standalone

- Standalone → Bundle
- Bundle → Standalone
- Bundle → Bundle
- Bundle → Option
- Option → Option

> Currently, it is supported for the scope Product, Product Group only.

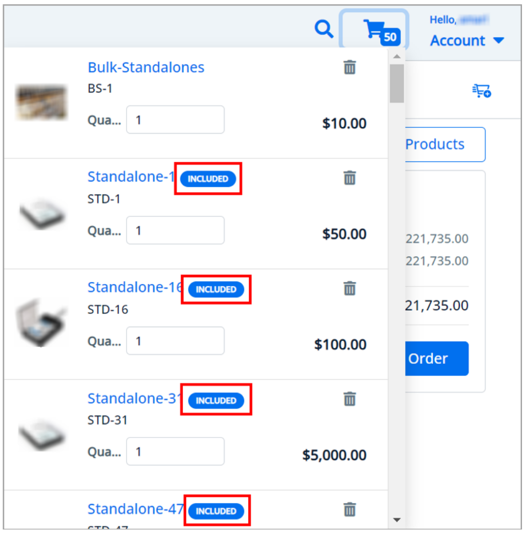
2) Show Message

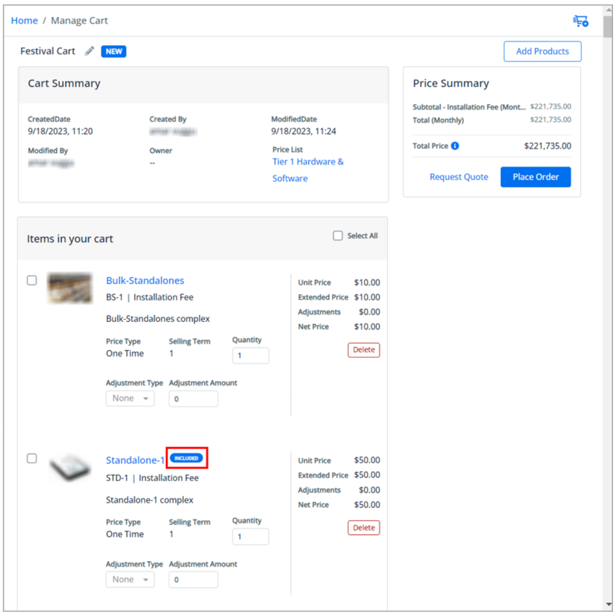
3) Prompt (as per design, displays an error message) acts similarly to *Show Message* in the case of Catalog products.

> Show and Prompt Messages that are similar and have two types of action disposition:
> - **Error**: When the action disposition is set to error, the user cannot close the constraint rule message that appears on the user interface.
> - **Warning**: When the action disposition is set to the warning, the user can dismiss the constraint rule message that appears on the user interface and appears again when you navigate to another page.

The inclusion rule matches when the scope is *Product, Product Group, Criteria, Field Set, or Product Family*. For *Product Group* and *Product Family*, the rule values of the inclusion type rules must be **Include Any, Include All,** and **Include Min/Max**. The minimum and maximum match rule for Inclusion must have Include Min/Max as the rule values.

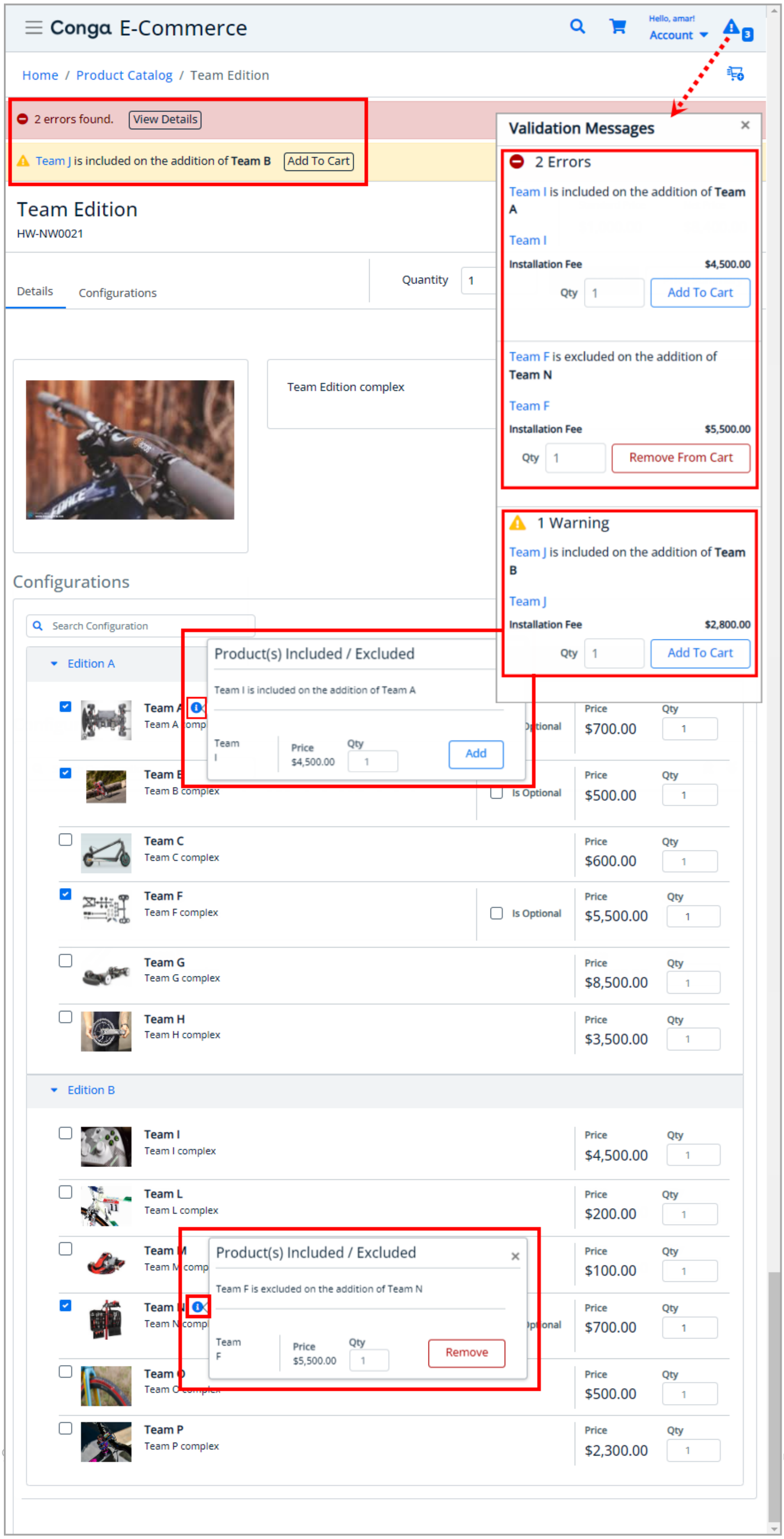
There is no message for successful product inclusion; however, for the product that is automatically included, you can see an Included badge in the Mini Cart and Main Cart.

<table>
<tr><th>Mini Cart</th><th>Main Cart</th></tr>
<tr><td>


</td><td>


</td></tr>
</table>

Error and Warning both are supported. When you add any product to the cart with validation or inclusion/exclusion rules, you will see the in-line (popup) and page-level validation message and an alert icon with the number of warnings/errors next to the mini cart icon. You can review the validation message and add/remove the suggested product.


Conga E-Commerce
Hello, amar!
Account
Home / Product Catalog / Team Edition
2 errors found. View Details
Team J is included on the addition of Team B Add To Cart
Team Edition
HW-NW0021
Details
Configurations
Quantity 1
Team Edition complex
Validation Messages
2 Errors
Team I is included on the addition of Team A
Team I
Installation Fee $4,500.00
Qty 1 Add To Cart
Team F is excluded on the addition of Team N
Team F
Installation Fee $5,500.00
Qty 1 Remove From Cart
1 Warning
Team J is included on the addition of Team B
Team J
Installation Fee $2,800.00
Qty 1 Add To Cart
Configurations
Search Configuration
Edition A
Product(s) Included / Excluded
Team I is included on the addition of Team A
Team I
Price $4,500.00
Qty 1
Add
Team B
Team B complex
Is Optional
Price $700.00
Price $500.00
Team C
Team C complex
Price $600.00
Team F
Team F complex
Is Optional
Price $5,500.00
Team G
Team G complex
Price $8,500.00
Team H
Team H complex
Price $3,500.00
Edition B
Team I
Team I complex
Price $4,500.00
Team L
Team L complex
Price $200.00
Product(s) Included / Excluded
Team F is excluded on the addition of Team N
Team F
Price $5,500.00
Qty 1
Remove
Price $100.00
Price $700.00
Price $500.00
Team P
Team P complex
Price $2,300.00

Managing Constraint Rules

Working with Exclusion Rules

The exclusion rule prevents certain products from being added to the shopping cart based on predefined conditions. You must create an exclusion rule in CPQ and publish it to use in the commerce platform.

For more information, see Creating a Constraint Rule and Configuring a Constraint Rule Using the Advanced Rule Setup.

The following are the supported product types for the scope **Product** and **Product Group:**

- Standalone → Standalone
- Standalone → Bundle
- Bundle → Standalone
- Bundle → Bundle
- Bundle → Option
- Option → Bundle
- Option → Option

The following are the supported types of Action Intent:

- Disable Selection
- Show Message
- Prompt

The exclusion rule matches when the scope is *Product* or *Product Group*. For exclusion type rules (**Match All**, **Match Any**, and **Match Min/Max**), the rule values must be **Exclude All, Exclude After One**, and **Exclude After Max**. The maximum match rule for exclusion must have Exclude After Max as the rule value.

Error and Warning both are supported. In the case of all action intents, the **Add to Cart** button is disabled on the product catalog page and product details page.

> **Behavior of Constraint Rule when configuring Include Any for Scope = Product Group or Product Family**
> When you configure Include Any in Constraint Rule for Scope = Product Group or Product Family, an error or warning message is displayed adding more than one option from the selected product group or product family to the cart.

Sub-bundle

Sub-bundles created up to level 6 are performance compliant.

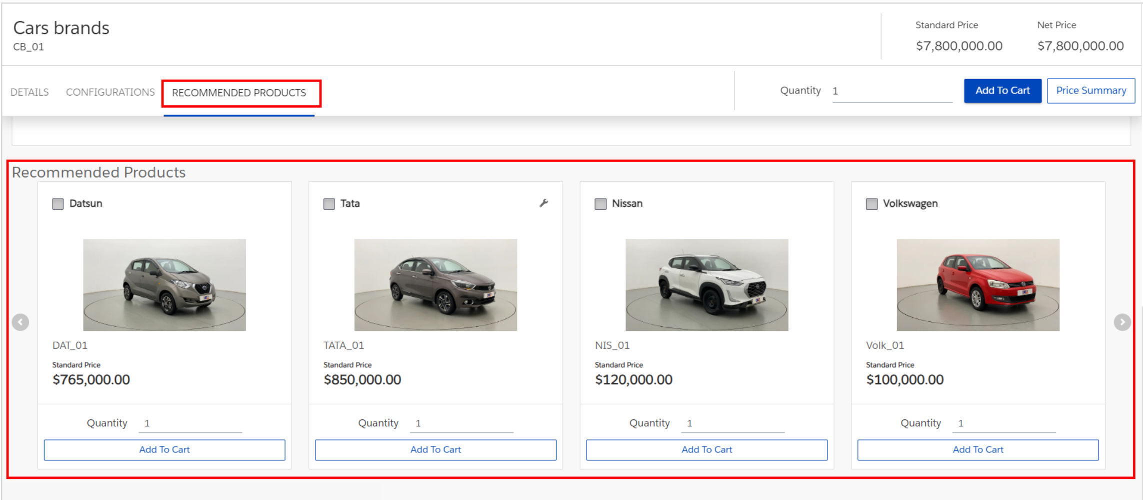
Managing Constraint Rules

Working with Recommendation Rule

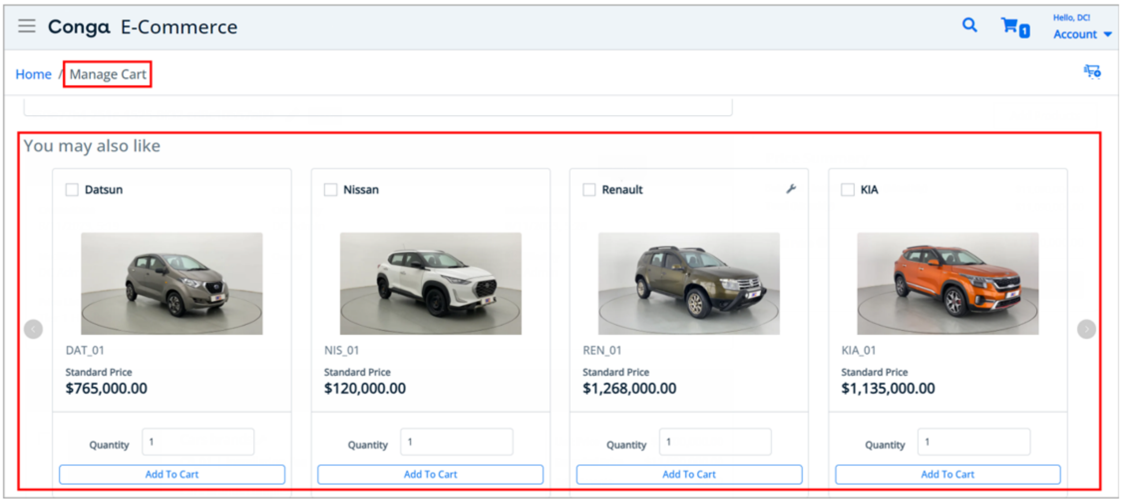
The recommendation rule suggests relevant products when specified conditions are met. You must create a recommendation rule in CPQ and publish it to use in the commerce platform. For more information, see Creating a Constraint Rule and Configuring a Constraint Rule Using the Advanced Rule Setup.

Based on the configuration, recommendation type rules are displayed on the product details page and cart page.

- **Product Details** page: You can see the list of recommended products under the **Recommended Products** tab and you can also add recommended products directly from the list.



- **Cart** page: You can see the list of recommended products after line item information and can also add them directly from the list.



Managing Constraint Rules

Working with Replacement Rule

Replacement rule automatically replaces or suggests alternative products when specific conditions are met. It ensures that the right product is chosen based on set criteria. You must create a replacement rule for desired standalone products, bundles, and options in CPQ and publish it to use in the commerce platform.

For more information, see Creating a Constraint Rule and Configuring a Constraint Rule Using the Advanced Rule Setup.

The following are the supported product types for the scope **Product**:

- Standalone → Standalone
- Standalone → Bundle
- Multiple Standalone → Standalone
- Multiple Standalone → Bundle
- Bundle → Bundle
- Bundle → Standalone
- Multiple Bundle → Bundle
- Multiple Bundle → Standalone
- Option → Option
- Multiple Option → Option
- Default Option → Option

Currently, it is supported for the scope Product only.

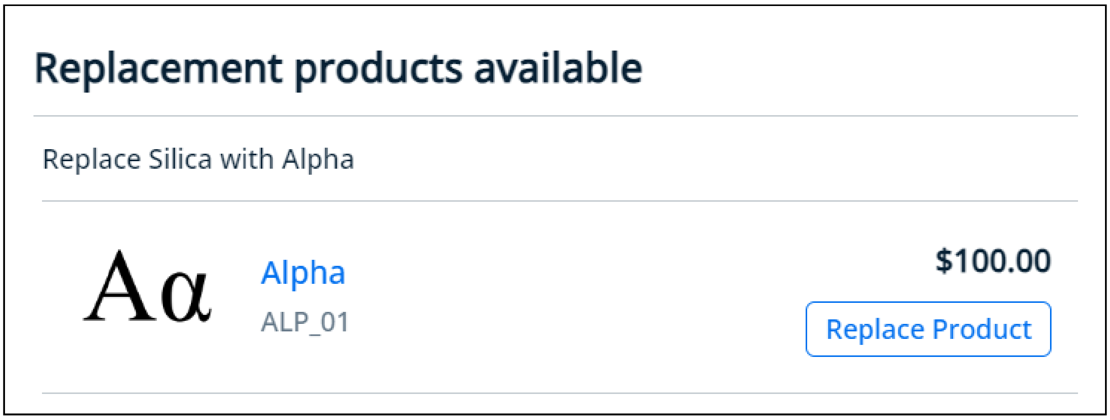
The following are the supported types of Action Intent:

Prompt	Displays a modal with choices of products that you can select or remove.
Show Message	Displays a message.

Based on the configuration, replacement type rules are displayed on the product details page, product catalog page, and cart.

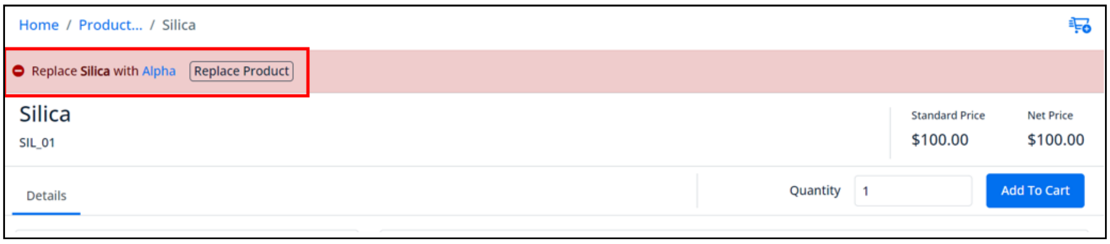
Prompt

When you add a product configured with a replacement rule set to 'Prompt,' the application displays a modal to replace the product. Click **Replace Product** to replace the product in the cart.

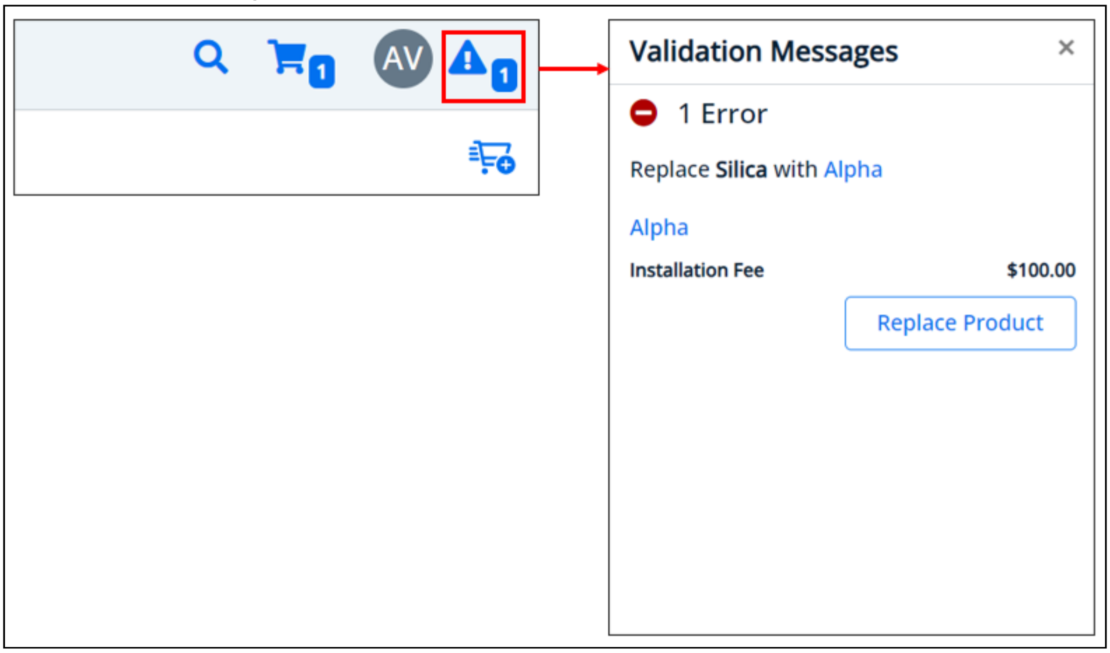


Show Message

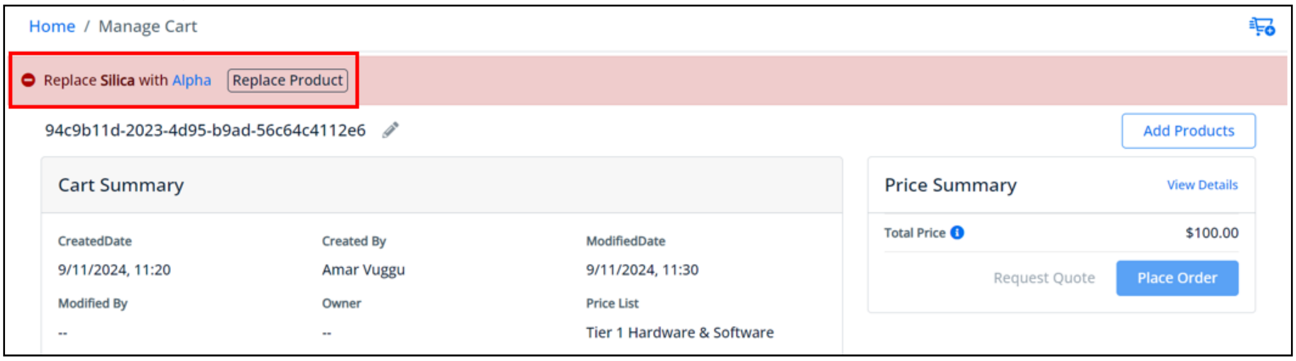
- When you add a product configured with a replacement rule set to 'show message,' the application displays a message to replace the product and shows a validation message icon next to the profile icon. Click **Replace Product** to replace the product in the cart.



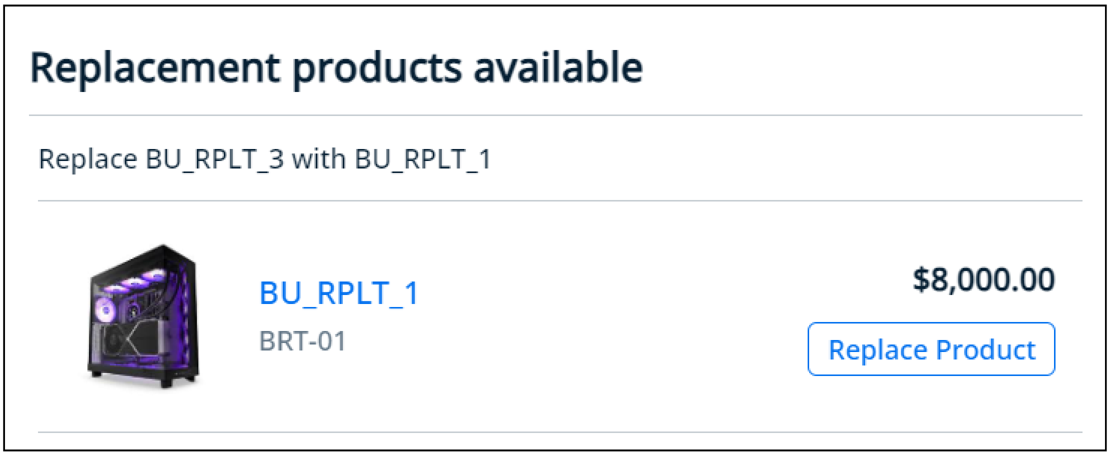
- Validation Message



Show Message on Cart



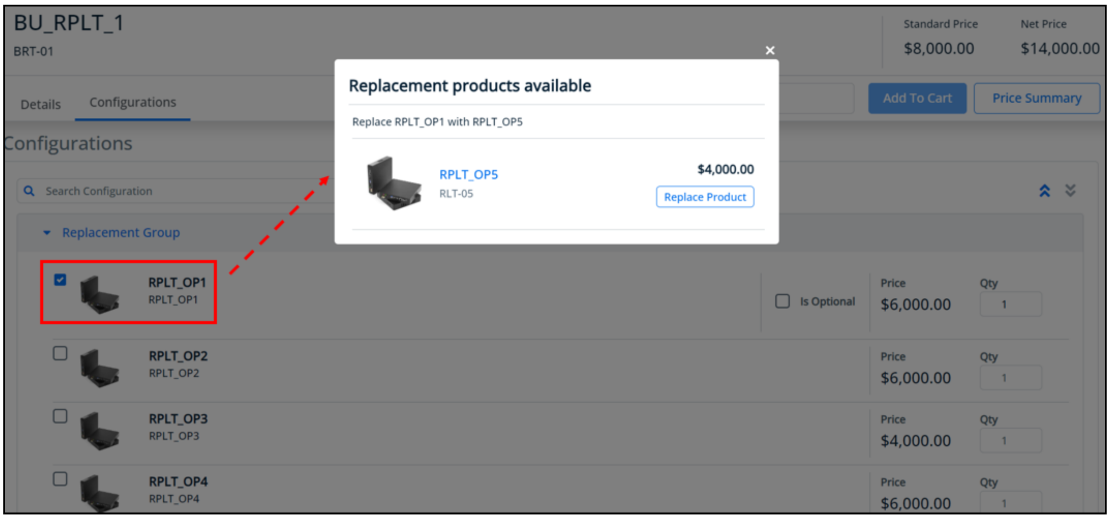
Bundle to Bundle



Multiple Bundle to Standalone

Option to Option in Bundle

When you select an option from Bundle Configuration, the rule gets triggered to replace with another option.



Managing Constraint Rules

Managing the Cart

The Carts home page or My Carts page displays a list of all carts that you have created for the selected account. The cart list displays carts with the following information:

- Name
- Created Date
- Number of Items
- Total Amount
- Status

> The following API with the appropriate parameters is used to retrieve the selected account's cart data. For more information, click here.
> **GET** `https://<URL_of_the_Instance>/api/carts/v1/carts`
> **For example:** `https://<URL_of_the_Instance>/api/carts/v1/carts?filter=eq(Account.Id:'<actual accountId>')&filter=noteq(Status:'Saved')&sort=DESC(ModifiedDate)&Page=<pageNumber>&limit=<pageLimit>`

From the **My Carts** page, you can:

- **Create a cart**: You can create a cart by clicking **New Cart**.

  > The following API is used to create a cart. For more information, click here.
  > **POST** `https://<URL_of_the_Instance>/api/carts/v1/carts`
  > You can also create a contract price list to apply special pricing to the cart and cart line item levels. Refer to the following steps for contract pricing:
  > - The implementer creates a contract price list and adds the **Contract Number** while creating a Contract Price List. (API reference)
  > - The implementer creates a contract price list item. For more information, see Creating a Price List Item. (API Reference)
  > - The user applies contract pricing at the cart level and adds the **Contract Number** while creating a Cart. Cart level contract pricing is not available with an out-of-the-box template. You need to implement it for the Cart Details page.
  > - The user applies contract pricing at the cart line item level and adds the **Contract Number** while creating a Cart Line Item.

- **Search a cart**: You can search for the cart to refine the cart list. Enter a keyword related to the name. It displays all carts that contain that keyword.

  > The following API with the filter parameter is used to search the particular cart. For more information, click here.
  > **GET** `https://<URL_of_the_Instance>/api/carts/v1/carts`

- **Delete a cart**: Select a particular cart from the list > click the More (⋮) icon > select the **Delete** option.

  > The following API is used to delete the cart. For more information, click here.
  > **DELETE** `https://<URL_of_the_Instance>/api/carts/v1/carts/{Id}`

- **Delete carts**: Select carts from the list > click the Delete ( ) icon.

> ⓘ The following API is used to delete the cart. For more information, click here.
> **DELETE** https://<URL_of_the_Instance>/api/carts/v1/carts

- **Cone a cart:** Select the cart from the list that you want to clone > click the More ( ) icon > select the **Clone** option.

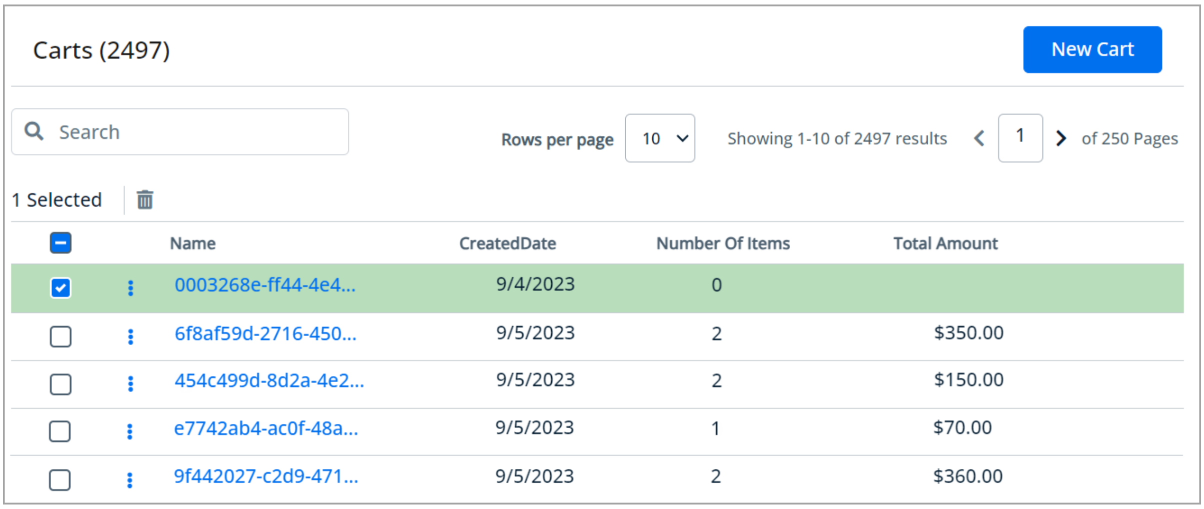
> ⓘ The following API is used to clone the cart. For more information, click here.
> **POST** https://<URL_of_the_Instance>/api/cart/v1/carts/{cartId}/clone

- **Set a cart as active**: Select a particular cart from the list > click the More ( ) icon > select the **Is Active** option to make that cart a primary cart. The active cart is highlighted with a green color. Changing the active cart with a different pricelist displays the categories and products of the selected pricelist on the cart in real time.

> ⓘ The following API with respective parameters is used to set the other cart as active. For more information, click here.
> **PATCH** https://<URL_of_the_Instance>/api/carts/v1/carts

- **Set Effective Date:** Select a particular cart from the list > click the More ( ) icon > select the **Set Effective Date** option to set the effective date for the selected cart. Based on the data and time set in this field, the pricing and config engines price and run rules on the cart. For example, if the cart's effective date is 30 days from now, the pricing engine will use the pricing that will be active on that date to calculate the prices of the products in the cart's line items, and the config engine will run the rules that will be active on that date.
- **Sort the cart list**: You can sort the cart list by clicking the Name, Created Date, and Status column names.
- **Set pagination:** You can specify how many carts should be displayed on a single page. To enable pagination, go to the per page field on the top right bar and select a value from 10, 20, 30, or 40 carts per page.

> ⓘ The following API with the page, limit, and sort parameters is used for sorting and pagination. For more information, click here.
> **GET** https://<URL_of_the_Instance>/api/carts/v1/carts
> **For example:** https://<URL_of_the_Instance>/api/carts/v1/carts?filter=eq(Account.Id:'<actual accountId>')&**sort=ASC(Name)&Page=1&limit=10**



As an experienced buyer, you can also use the **Quick-Add** ( ) button to add multiple products to the cart and create quotes and orders quickly. For more information, see Using CTA (call-to-action) "Quick-Add" button.

Select one of the following topics for more information:

- Working with the Cart
- Working with the Mini Cart
- Configuring Cart Line Item Fields
- Cloning Primary Line Items
- Deleting Primary Line Items
- Applying Promotions

Working with the Cart

Click the cart icon on the top right of the storefront, and then click the **View Cart** button to view the active cart. You can also go to the **My Carts** page and click the particular cart name link to view the active cart.

New Cart

You can perform one or more of the following actions from the new cart:

- View the complete list of selected products on the cart or from the mini cart
- Change the cart name: Click the **pencil** ( ) icon and modify the cart name
- View cart status
- View cart summary
- Search for line items using the search bar

- Clone the cart: Click the **Clone Cart** button to clone the new cart
- Activate the Cart: Click the **Activate Cart** button to make the cart an active cart
- Add products to the cart: Click the **Add Products** button to add more products to the cart
- Add recommended product to the cart: If a recommendation rule is set for the product, you can see the **Recommended Products** tab next to the **Details** or **Configuration** tab to display a list of recommended products. You can add recommended products directly from the list

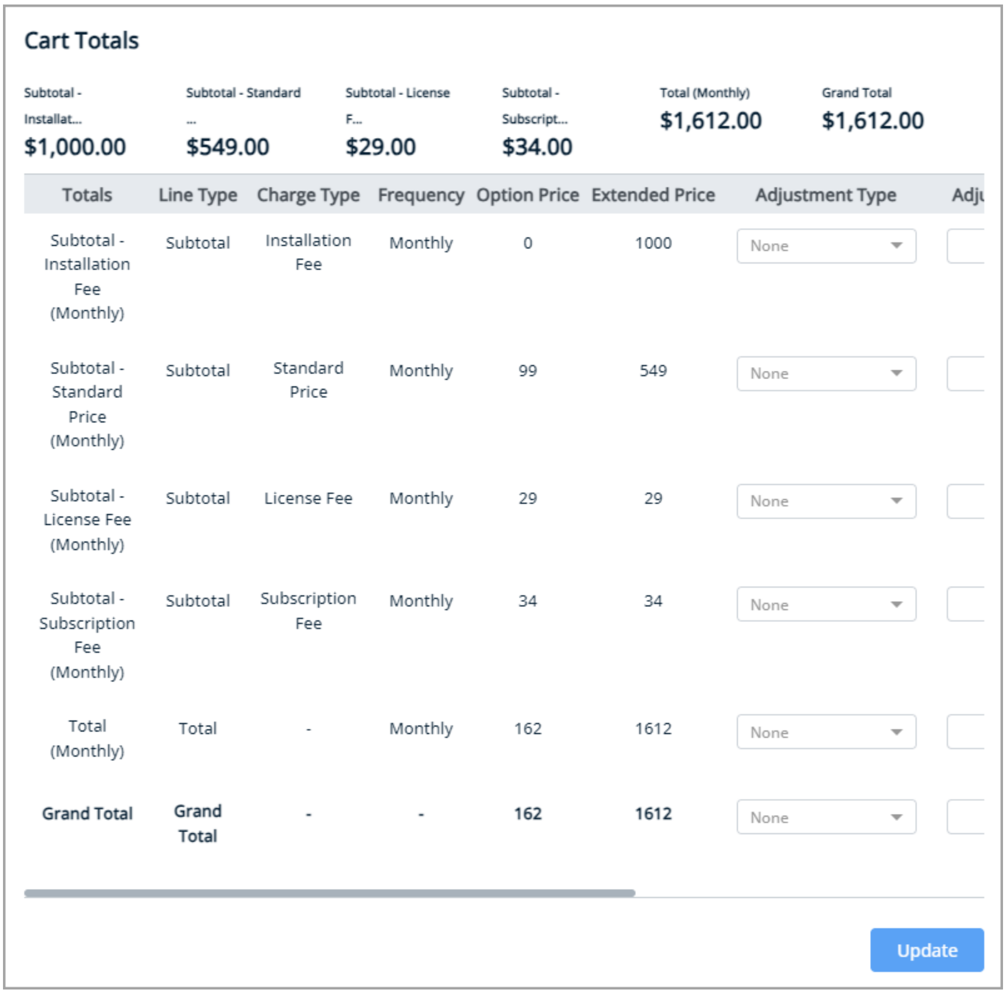
> By default, the recommended products feature is enabled. If you do not want to display the recommended products, disable the feature by setting the EnableProductRecommendation flag in ConfigSystemProperties to false. Use the following API to disable the flag. For more information, see Update Custom Settings associated with a flow.
> **PUT** `https://<URL_of_the_Instance>/api/revenue-admin/v1/flows/{flowname}/settings/ConfigSystemProperties`

- Change quantities
- Change adjustment type and amount
- Change the start date and end date for Subscriptions
- Delete line item(s). For more information, see Deleting Primary Line Item(s).
- Configure fields on the cart details page in real time. For more information, see Configuring Cart Line Item Fields
- Navigate to the Product Details page: Click on the product name to go to the product details page and also update the configuration
- View product-level price summary and totals
- View cart level price summary and total price
- View cart level detailed breakup:

  Click the information ( ) icon available next to the Total Price label. A Cart Total popup with the default columns is visible. While reviewing the details, you can also update the editable fields (for example, Charge Type, Frequency, Adjustment Type, Adjustment Amount, etc.) and click **Update** to update the pricing in the Price Summary section.

  > The implementer first sets up the flow and configures the column display (list and sequence of fields), and then passes the flow name to the default field **DefaultFlow** of the Storefront, which displays the required columns when you click the View Details icon. If you do not specify a flow name, the application will use **system** flow by default. The implementor can also set the field as editable while configuring the column display.

For more information on how to create Flow and configure columns, see Configuring the Flows and Configuring Column Settings.



- View/update configuration details: Click on the wrench icon ( ) to view or update the product configuration.
- Create a favorite configuration: Select a particular line item or all line items and use the **Save as favorite** option. For more information, see Managing Favorites.
- Apply promotions. For more information, see Applying Promotions.
- Request a quote
    - If the quote is in the draft status, you can click the edit button from the Quote details page and add, delete, and modify the line items.
    - Click **Finalize & Submit** to apply the changes to the cart and quote.
    - Click **Discard Changes** if you do not want to apply your changes to the cart and quote.
- Place an order
    - If the order is in the draft status, you can click the edit button from the Quote details page and add, delete, and modify the line items.

- Click **Confirm Changes** to apply the changes to the cart and order.
- Click **Discard Changes** if you do not want to apply your changes to the cart and order.

> When you update any of the fields, the following API is used to reflect the changes and reprice the product and cart price. For more information, click here.
>
> **PATCH** `https://<URL_of_the_Instance>/api/cart/v1/carts/{cartId}/items`
>
> The following API is used when you delete any product. For more information, click here.
>
> **DELETE** `https://<URL_of_the_Instance>/api/cart/v1/carts/{Id}`

> If the price process of the cart takes longer than expected, the application attempts to fetch the cart status again for the number of retry attempts and inter-attempt delay specified in the cart status retry settings. If pricing the cart takes longer, these options are presented:
>
> 
>
>
> - **Check Status**: The application retries the cart status fetch, doubling the number of retry attempts specified while configuring cart pricing status retry settings. For example, if you set 5 retry attempts, the application attempts 10 retries.
> - **Abandon Cart**: Deactivates the current cart and creates a new one. You can then add the products again into the new cart.

Finalized Cart

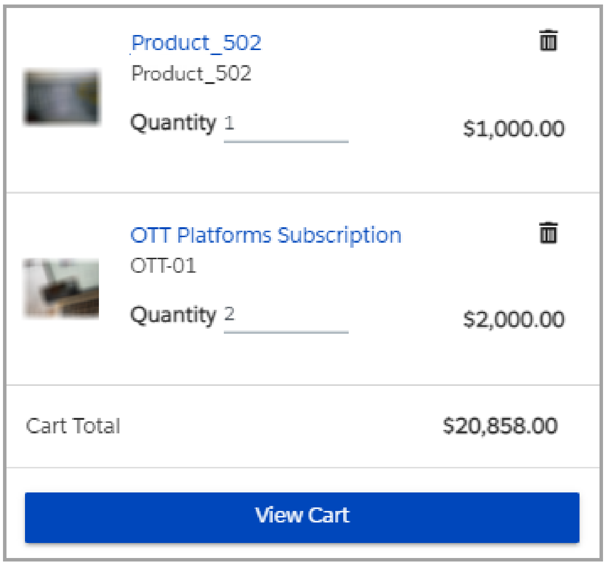
You can perform one or more of the following actions from the finalized cart:

- View the complete list of selected products on the cart
- Change the Cart name: Click the **Pencil** ( ) icon and modify the Cart name
- View cart summary
- Search for line items using the search bar
- Use the **Associate to** link to review the Order or Quote record associated with the cart
- View cart level price summary and total price
- View cart level detailed breakup: Click the information ( ) icon available next to the Total Price label under the Price Summary section
- Create a favorite configuration: Select a particular line item or all line items and use the **Save as favorite** option. For more information, see Managing Favorites

Working with the Mini Cart

While navigating the catalog, at any time if you want to quickly view your selected products, click the mini cart ( ) icon on the top right of the storefront. The mini cart appears.

> - When there is no active cart and you click on the mini cart icon, you can see the message "You do not have a cart yet. Add products to get started".
> - When there is an empty active cart and you click the mini cart icon, you can see the message "Your cart is empty".



You can do one or more of the following from the mini cart:

- View selected products
- Navigate to the Product Details page: Click on the product name to go to the product details page and also update the configuration.
- Delete items in the cart
- Change quantity
- View the full cart
- View the product and cart level price

> When you update any of the fields, the following API is used to reflect the changes and reprice the product and cart price. For more information, click here.
> **PATCH** https://<URL_of_the_Instance>/api/cart/v1/carts/{cartId}/items

The following API is used when you delete any product. For more information, click here.

DELETE https://<URL_of_the_Instance>/api/cart/v1/carts/{Id}

Configuring Cart Line Item Fields

As an end user, you can select which fields to display on the cart details page after your administrator has set up cart views using the CPQ Admin Console or APIs. The **Edit Layout** action button enables you to configure fields on the cart details page in real time. Clicking the **Edit Layout** button lists all the fields made available by your administrator. The sequence of the fields in the Edit Layout list is determined by the sequence set by your administrator when the displays were created.

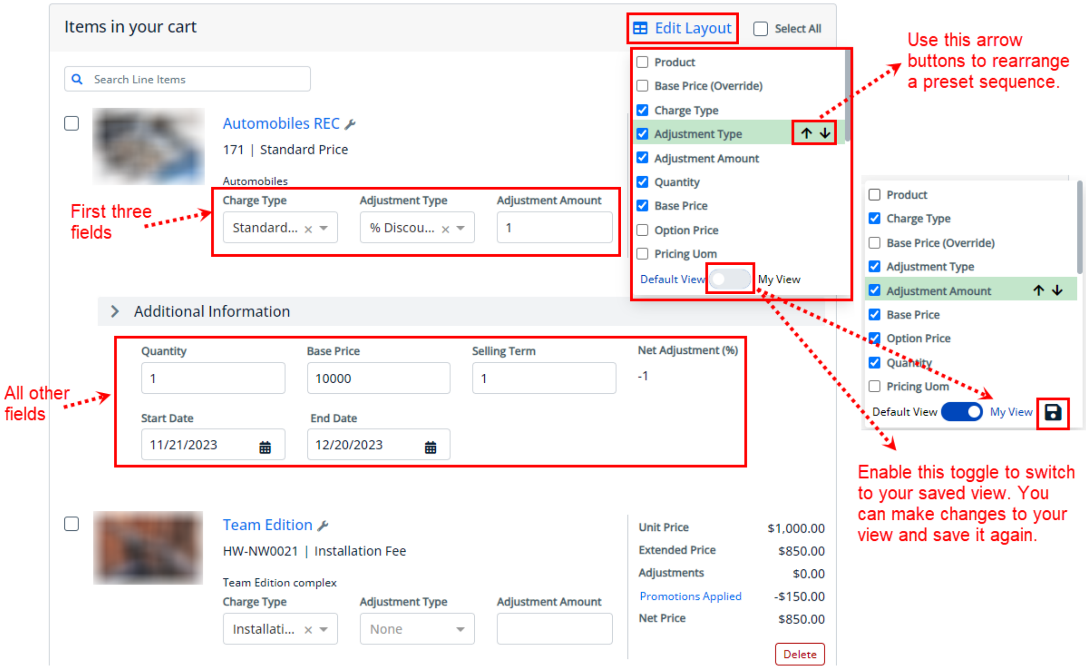
Prerequisites

- Set up the **Flow** and add the flow name to the storefront's default field **DefaultFlow**. If you do not specify a flow name, the application will use **system** flow by default. For more information, see Configuring the Flows or Flow APIs.
- Configure the **Column Display** (list and sequence of fields) for the specific flow. For more information, see Configuring Column Settings or Flow Displays APIs.
- Create a **View** for the specific flow and make it the **default**. For more information, see Managing Cart Views on the Cart Page or Flow View APIs.

On the cart details page, you can select the fields you want to see for line items. These fields are displayed in the line item in the order selected in the Edit Layout list.

As per design, the first three fields are displayed just below the product information. If more than three fields are selected, the remaining fields are displayed under the Additional Information expandable accordion. All the selections are applied to both primary line items and charge line items. The sequence of the fields changes based on what you select in the Edit Layout list. For example, if you remove the Selling Term, the Start Date moves up in sequence. The selected fields apply to all the line items on the cart details page. You can rearrange the default sequence using the up and down arrow buttons.

If you want to make changes to the view and save it for use afterward, switch from Default View to My View, make your selection, rearrange the sequence if necessary, and then click the **Save** ( ) icon. When you visit the cart details page, you can toggle between the default view and your saved view.



Cloning Primary Line Items

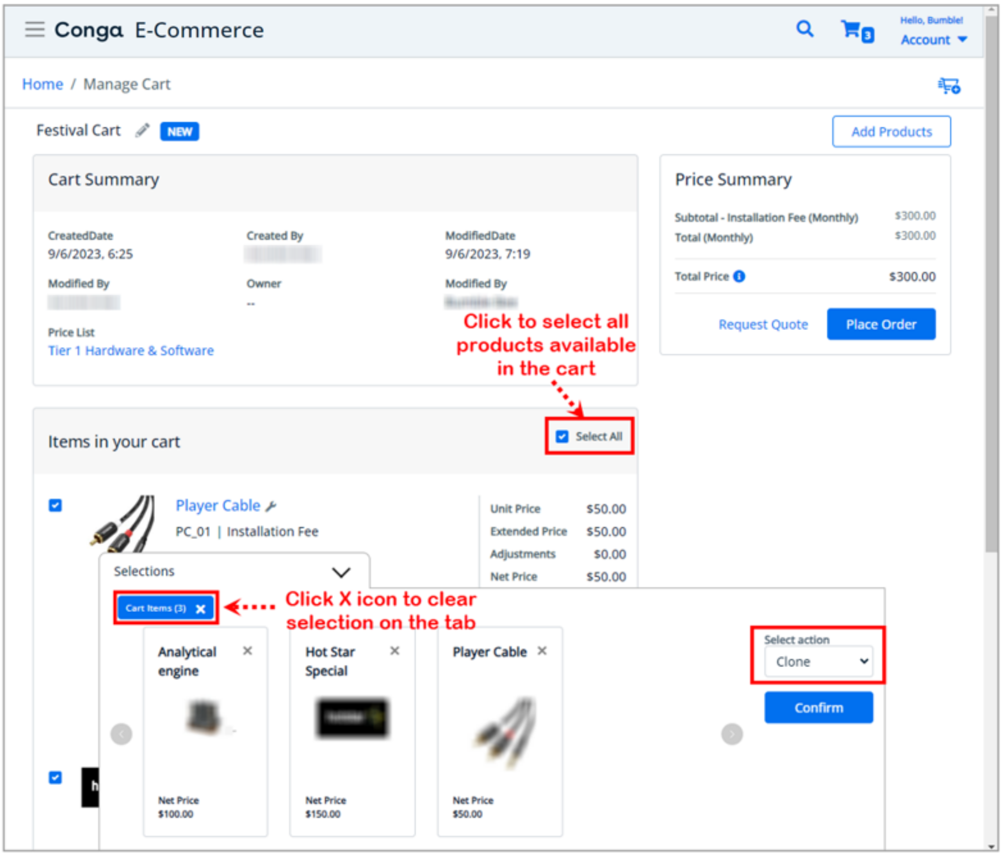
You can add a clone of existing primary line items to the cart. The new cloned line item has the same selected configuration as the source line item. You can then modify the cloned line item as per your requirement. This eliminates the need for you to start configuring a line item from scratch.

Every line item on the Cart details page has a checkbox beside it. Selecting the checkbox opens a drawer with a list of selected items. From *Select action*, select **Clone** and click **Confirm** to add the selected items along with their configuration to the cart.

You can also **Select All** to select and add all the line items or remove some items and then add the rest of the items to the cart. You can later make modifications to the cloned line items.

> The following API is used to clone the line items. For more information, click here.
> **POST** `https://<URL_of_the_Instance>/api/carts/v1/carts/{cartId}/clone`

> Although there is no limitation on the number of line items you can add for cloning, it is advisable to have a quantity of less than 250 to avoid operations failing or taking too long to complete.

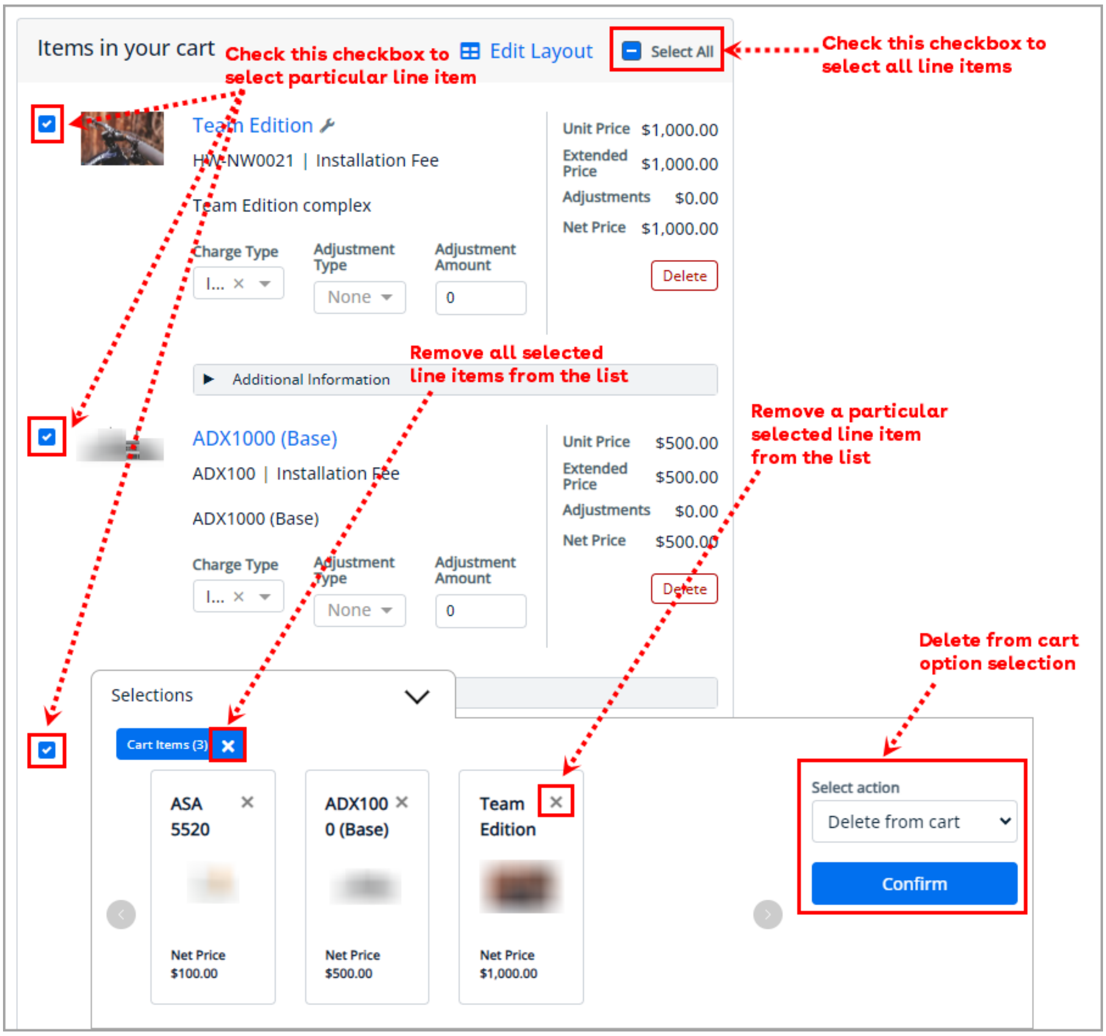


Deleting Primary Line Items

You can remove the already added primary line items from the cart details page. Every line item on the cart details page has a checkbox beside it. Selecting the checkbox opens a drawer with a list of selected items. From the **Select action**, select **Delete from cart** and click **Confirm** to remove the selected line items from the cart. You can also use the **Select All** option to select and remove all the line items available in the cart.

> The following API is used to delete line item(s) from the cart. For more information, click here.
> **DELETE** `https://<URL_of_the_Instance>/api/cart/v1/carts/{cartId}/items`

> To delete a specific line item from the cart, use the **Delete** button, which is available for each line item.



Applying Promotions

A promotion is a marketing technique that you apply to reduce the list price of a product or service. You can create such a promotion and restrict the scope, limit, and benefits so your sales representatives apply this promotion to specific products, for specific customers, and for a limited period.

- Apply automated promotions on the cart
- Apply coupon-based promotions on the cart
- Apply multiple promotions and coupon codes to your cart
- View all applied promotions for a given cart
- View details of applied promotions for a line item in the cart
- View promotion details at the line item level for a given promotion
- View the total promotion discount on the cart and line item level

You can utilize the following two types of promotion options:

- **Manual promotion**: You can manually view the available promo codes and apply one or more promo codes to your line item (product level) and the entire cart. You must have a cart that contains products to which you can apply promotions. You can apply or remove promotions or coupons on line items individually or all line items together (cart level).
- **Automatic promotion**: This type of promotion is applied to your line items (products) or your entire cart when the entry criteria for the promotion are met for the selected products and the entire cart. The application automatically updates your pricing for respective products or carts, depending on the promotion applied.

Known limitation for this release

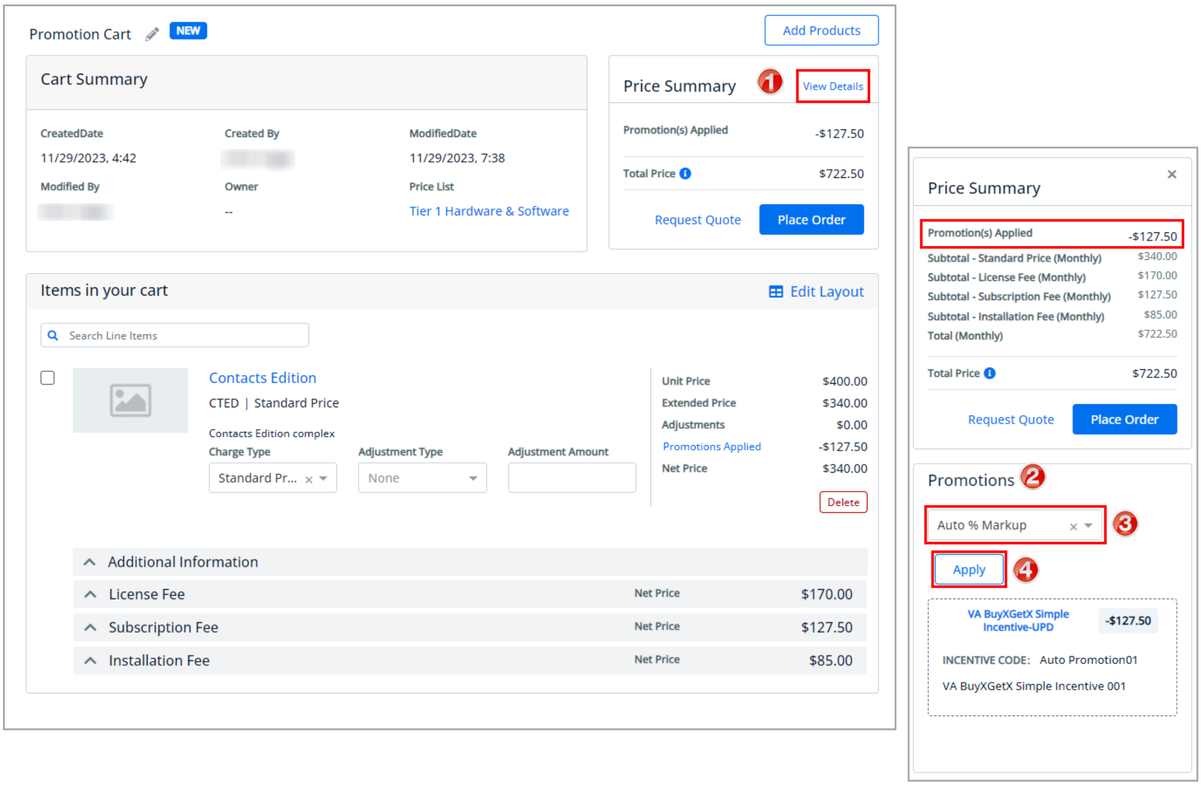
Although there is no limit to the number of products that can be added to the cart, it is recommended that you add up to 100 primary line items and up to 500 total line items, including bundles and options, to use the promotion feature. If you add more than the recommended number of products, the Promotions section will not appear when you click the View Details link.

Cart Level Manual Promotions

To apply promotions

1. Navigate to the cart.
2. Click the View Details link available in the Price Summary section.
3. Go to the Promotions section.
4. Select the promotion from the dropdown list and click **Apply**. You can apply other promotions in the same way.

The application automatically updates the pricing for the entire cart based on the promotion applied to all line items.



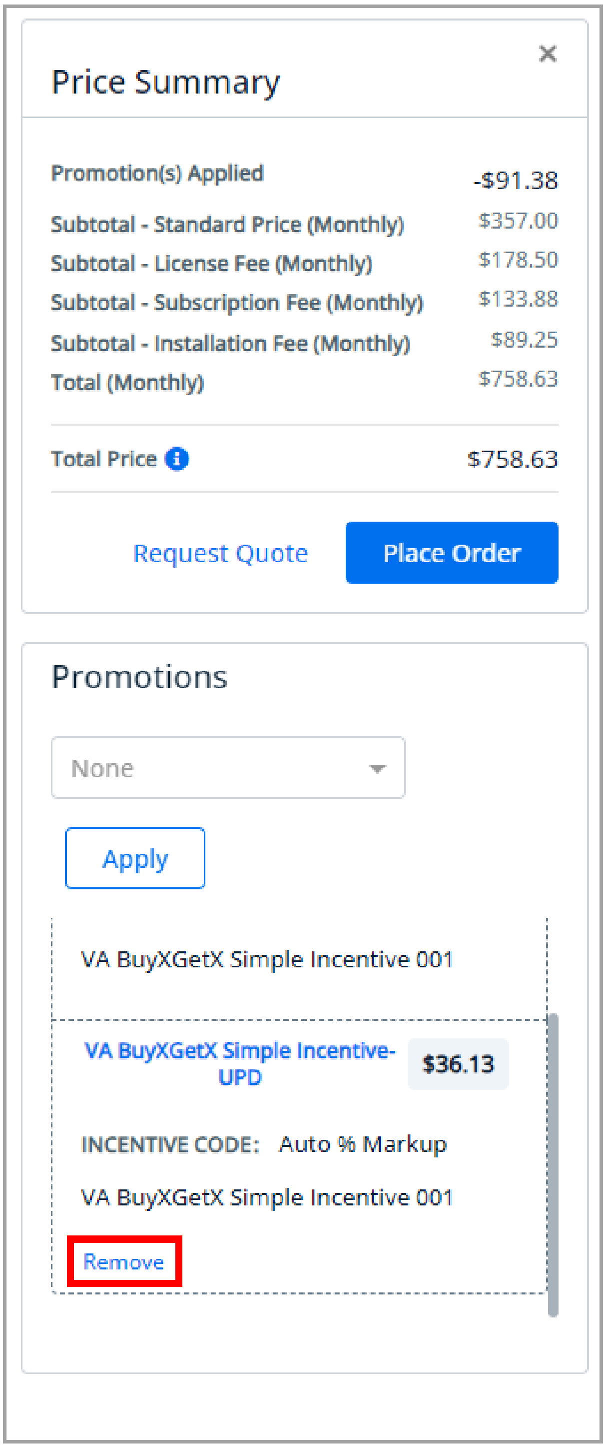
To view applied promotions

1. Navigate to the cart.
2. Click the View Details link available in the Price Summary section.
3. Go to the Promotions section.

All manually and automatically applied promotion lists are displayed under the Promotions section. You can also click on a specific promotion to view additional information about it.

To remove applied promotions

1. Navigate to the cart.
2. Click the View Details link available in the Price Summary section.
3. Go to the Promotions section.
4. Select the Remove link available for the applied manual promotion. You can remove other promotions in the same way.



Line Item Level Manual Promotions

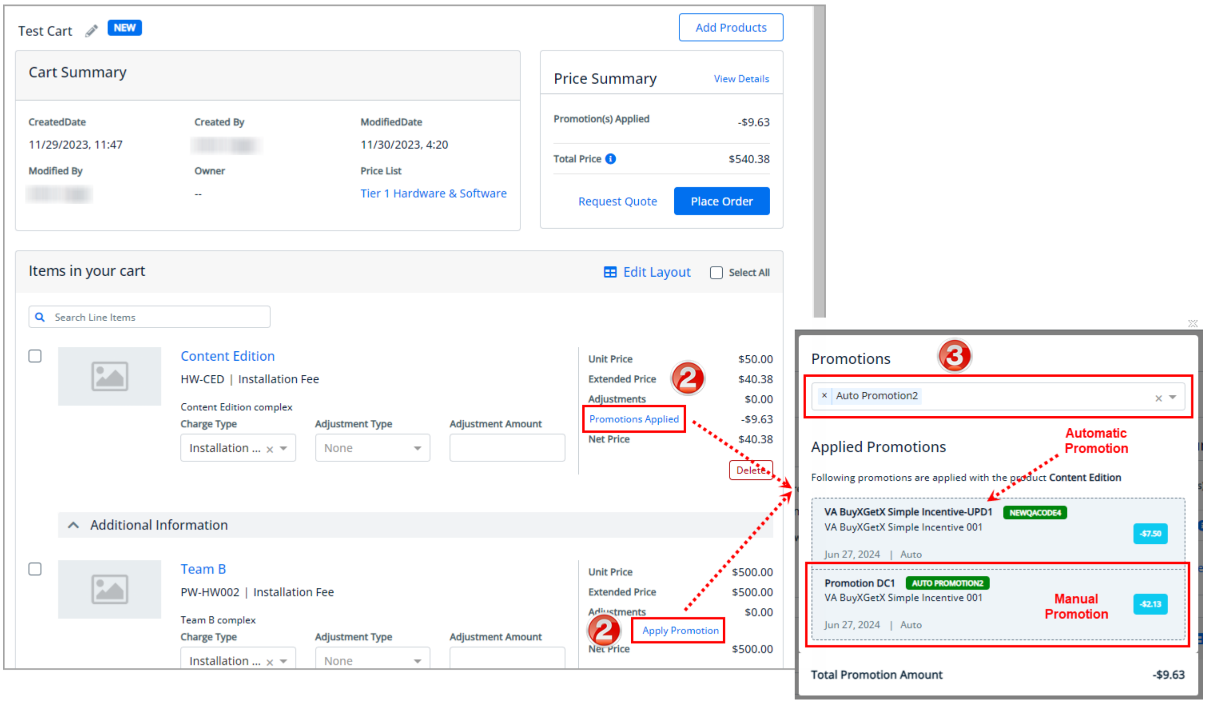
To apply promotions

1. Navigate to the cart.

2. Click the Promotions Applied or Apply Promotion link available at the line item level.
3. Select the promotion from the dropdown list and click anywhere outside. You can apply other promotions in the same way.

> ⓘ The application displays only those promotions that are eligible for the particular line item.

You can see all applied promotion-specific (promo code, incentive amount, etc.) details under the Applied Promotions section.



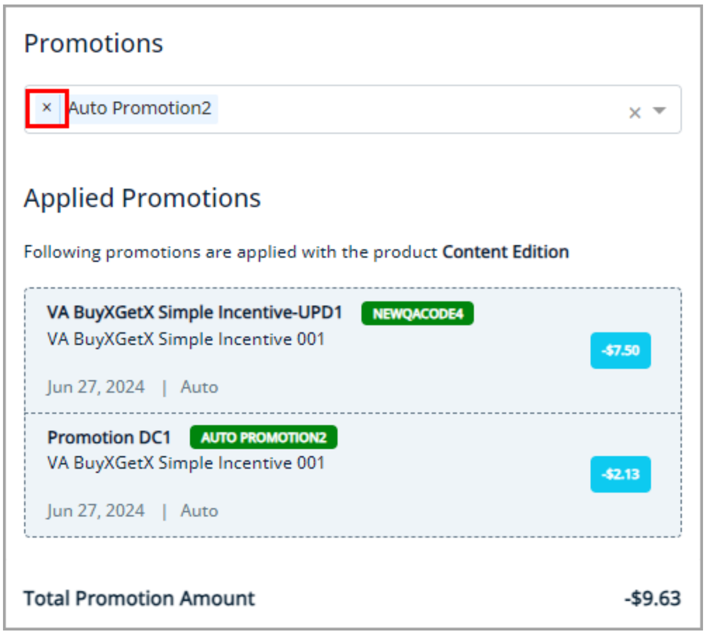
To view applied promotions

1. Navigate to the cart.
2. Click the Promotions Applied link available at the line item level.

All manually and automatically applied promotion lists are displayed under the Applied Promotions section.

To remove applied promotions

1. Navigate to the cart.
2. Click the Promotions Applied link available at the line item level.
3. Click the cancel icon and click anywhere outside. You can also remove multiple promotions in the same way.



Managing Favorites

As a Sales Rep, you can create quotes faster by using favorites, also known as saved configurations. These pre-defined setups let you:

- Quickly add products by selecting a favorite from the catalog and add it to your cart.
- Save time by reusing configurations for multiple quotes or orders. It ensures consistency and accuracy while speeding up the quoting and ordering process.

With the ability to add favorites to the cart like any other product from the catalog, sales reps can easily combine multiple saved configurations in a single order and quote. This feature allows for flexibility in accommodating customer preferences and requirements without starting the configuration process from scratch each time. By leveraging the favorite configuration, sales reps can enhance their efficiency and provide a smoother experience for customers by quickly generating accurate quotes and ensuring that all necessary product configurations are included.

The favorite configuration can be private or public. A private configuration is only visible to the user who has created the favorite; however, public configurations are displayed on the My Favorites page for all other Sales Reps.

> To use this functionality, the implementer must set the **EnableFavorite** flag available in the ConfigSystemProperties. Use the following API to enable the flag. For more information, click here.
> **PUT** `https://<URL_of_the_Instance>/api/revenue-admin/v1/flows/{flowname}/settings/ConfigSystemProperties`

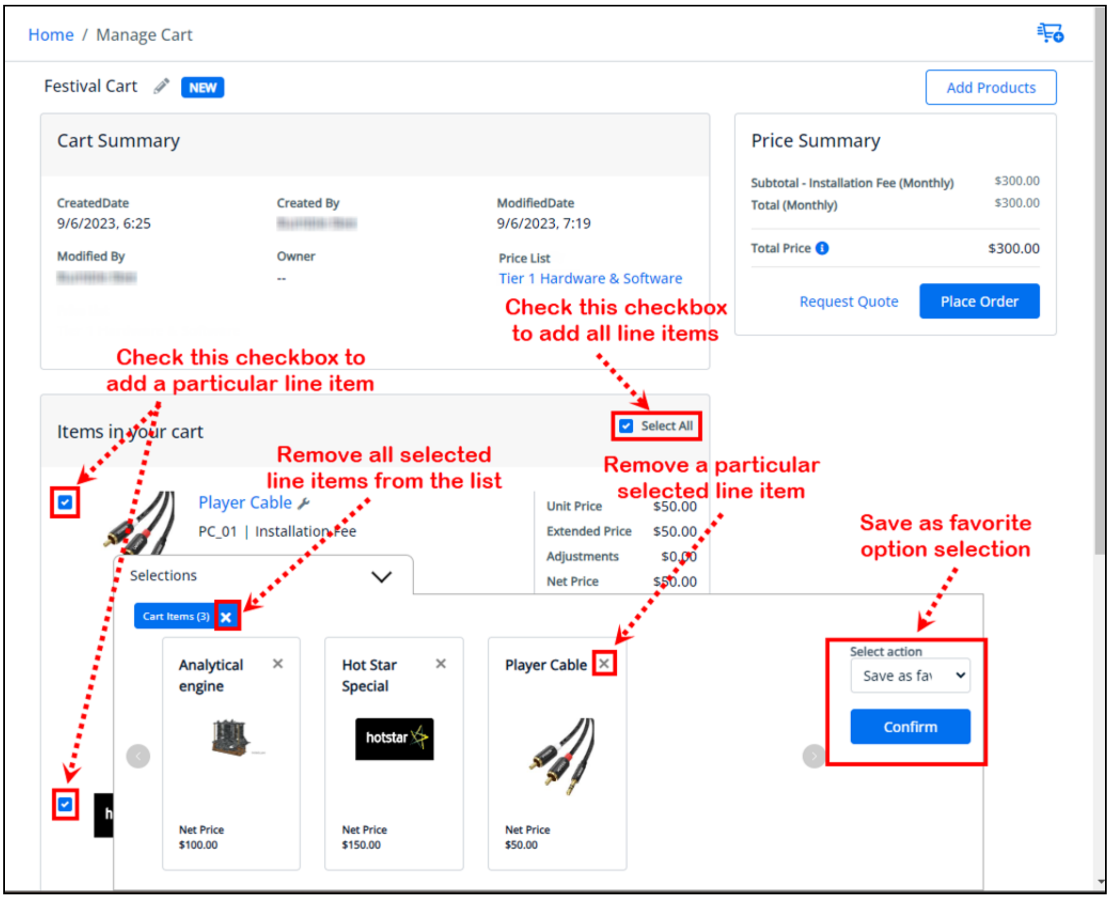
Saving a Cart Configuration as Favorite

The Save as Favorite feature enables you to save a cart configuration or products from the catalog for reuse and is available only for logged-in users. The saved configuration can be used multiple times in the same quote or across different quotes. A saved configuration includes all the selected products on the cart with the options and attributes defined within the product.

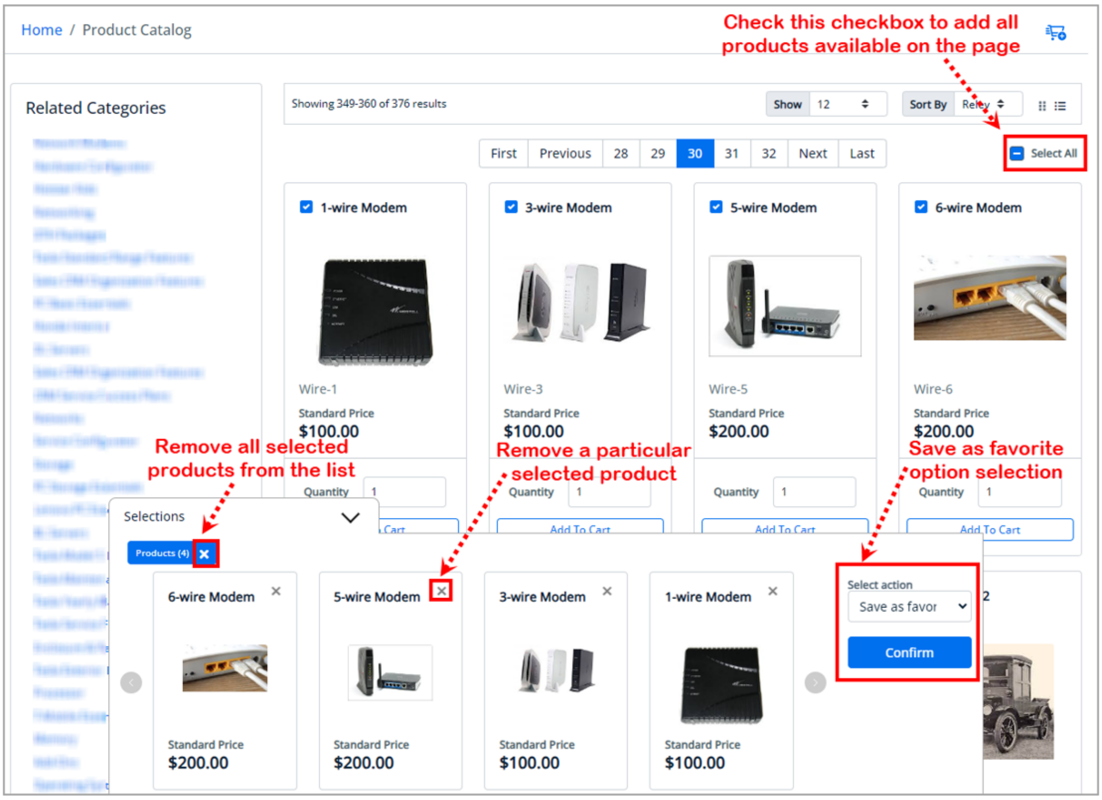
Every line item on the Cart details page and every product card on the Catalog has a checkbox beside it. Selecting the checkbox opens a drawer with a list of selected items. You can also use the **Select All** option to select and include all the line items of the Cart in the drawer to save them as a favorite or remove some items and then save the rest of the items as a favorite configuration. From the **Selection action**, select **Save as favorite** and click **Confirm** to save the selected items along with their configuration.

> Although there is no limitation on the number of products or line items you can add for your favorite configuration, it is advisable to have a quantity of less than 100 to avoid operations failing or taking too long to complete.

Cart details page


Home / Manage Cart
Festival Cart
NEW
Add Products
Cart Summary
CreatedDate
9/6/2023, 6:25
Created By
ModifiedDate
9/6/2023, 7:19
Modified By
Owner
--
Price List
Tier 1 Hardware & Software
Price Summary
Subtotal - Installation Fee (Monthly) $300.00
Total (Monthly) $300.00
Total Price $300.00
Request Quote
Place Order
Check this checkbox to add all line items
Check this checkbox to add a particular line item
Items in your cart
Select All
Remove all selected line items from the list
Remove a particular selected line item
Save as favorite option selection
Player Cable
PC_01 | Installation Fee
Unit Price $50.00
Extended Price $50.00
Adjustments $0.00
Net Price $50.00
Selections
Cart Items (3)
Analytical engine
Net Price $100.00
Hot Star Special
hotstar
Net Price $150.00
Player Cable
Net Price $50.00
Select action
Save as fav
Confirm

Catalog


Home / Product Catalog
Check this checkbox to add all products available on the page
Related Categories
Showing 349-360 of 376 results
Show 12
Sort By Rele
First Previous 28 29 30 31 32 Next Last
Select All
1-wire Modem
3-wire Modem
5-wire Modem
6-wire Modem
Wire-1
Standard Price $100.00
Wire-3
Standard Price $100.00
Wire-5
Standard Price $200.00
Wire-6
Standard Price $200.00
Remove all selected products from the list
Remove a particular selected product
Save as favorite option selection
Quantity 1
Add To Cart
Selections
Products (4)
6-wire Modem
Standard Price $200.00
5-wire Modem
Standard Price $200.00
3-wire Modem
Standard Price $100.00
1-wire Modem
Standard Price $100.00
Select action
Save as favor
Confirm

Selecting Save as favorite and clicking Confirm opens an **Add Favorite** popup that allows you to update an existing favorite or add a new one.

Updating an Existing Favorite

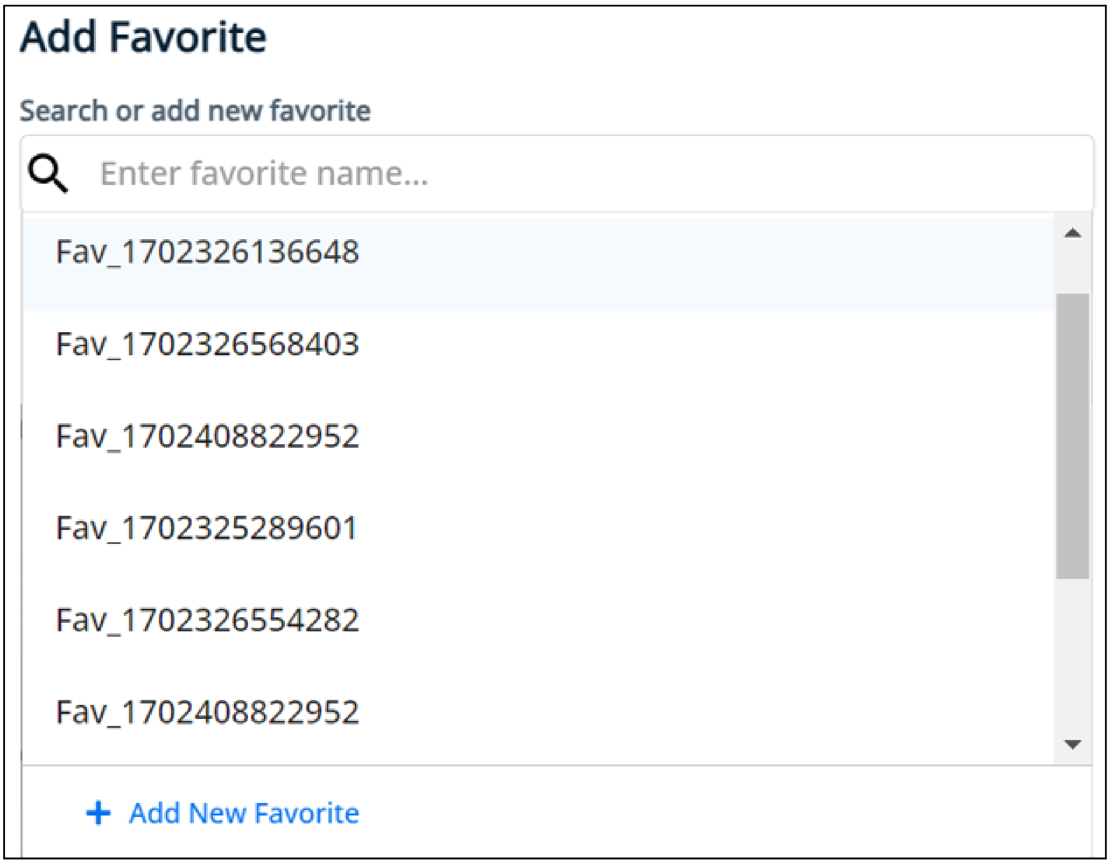
When you select Save as favorite and clicking Confirm, **Add Favorite** popup appears. To update an existing favorite, follow the steps below:

1. Search and select the existing favorite name.
2. Click **Update**.

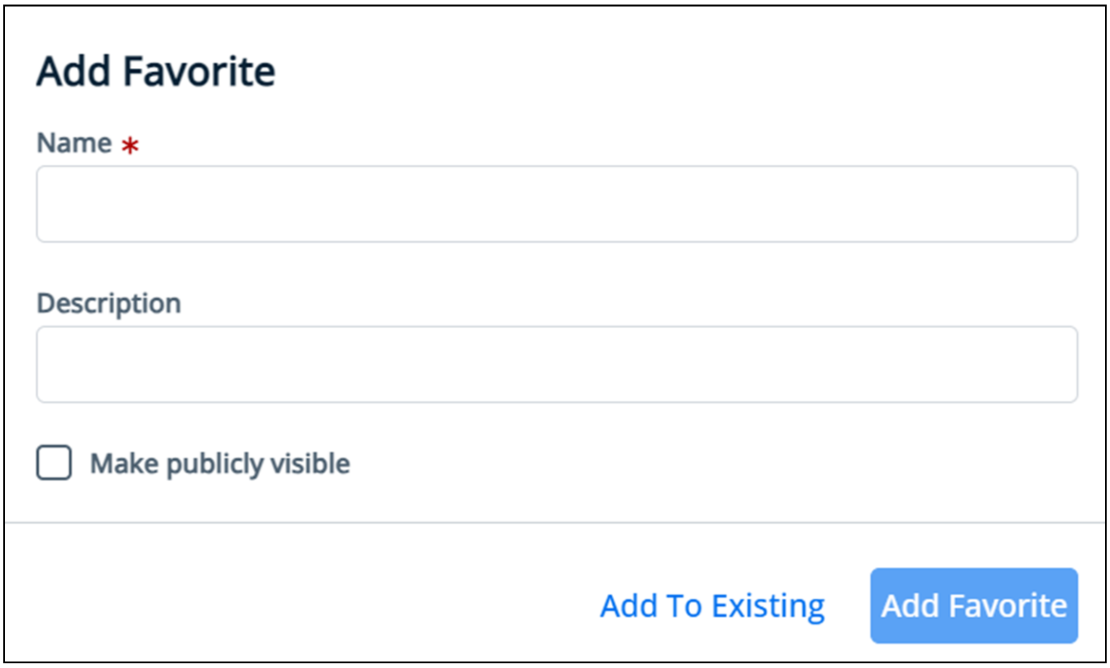
Adding New Favorite

To add a new favorite, follow the steps below:

1. click the search bar and select **Add New Favorite** option.



2. Specify a name for the new favorite.



3. Provide a brief description.
4. To make the favorite configuration visible to all the users on the account, select Make publicly visible. Do not select this checkbox, if you want to make the favorite configuration visible only to you.

5. Click **Add Favorite** to add a new favorite to the favorite list.
   Clicking the Add To Existing button takes you back to the search popup, where you can see all the existing favorites (including public ones) that are added by other users.

Working with Favorites

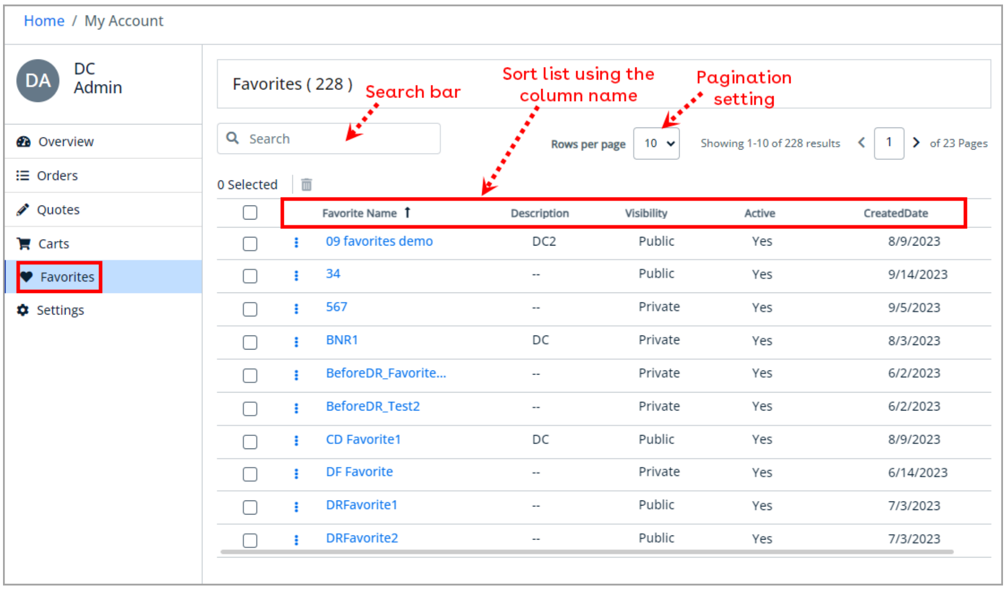
You can view and use favorite configurations from the My Favorites page.

> The following API with the appropriate parameters is used to retrieve the list of favorites for the user. For more information, click here.
> **GET** `https://<URL_of_the_Instance>/api/catalog/v1/favorites`
> **For example**: `https://<URL_of_the_Instance>/api/catalog/v1/favorites?sort=DESC(ModifiedDate)&Page={pageNumber}&limit={pageLimit}`

The Favorites home page lists all the favorite configurations (public and private). In the case of private favorite configurations, you can view only those private favorites that you have created as private favorite configurations. To see the details of a particular favorite configuration, click the **Favorite Name** link. On the details page, you can view the Favorite Summary and Line Items.

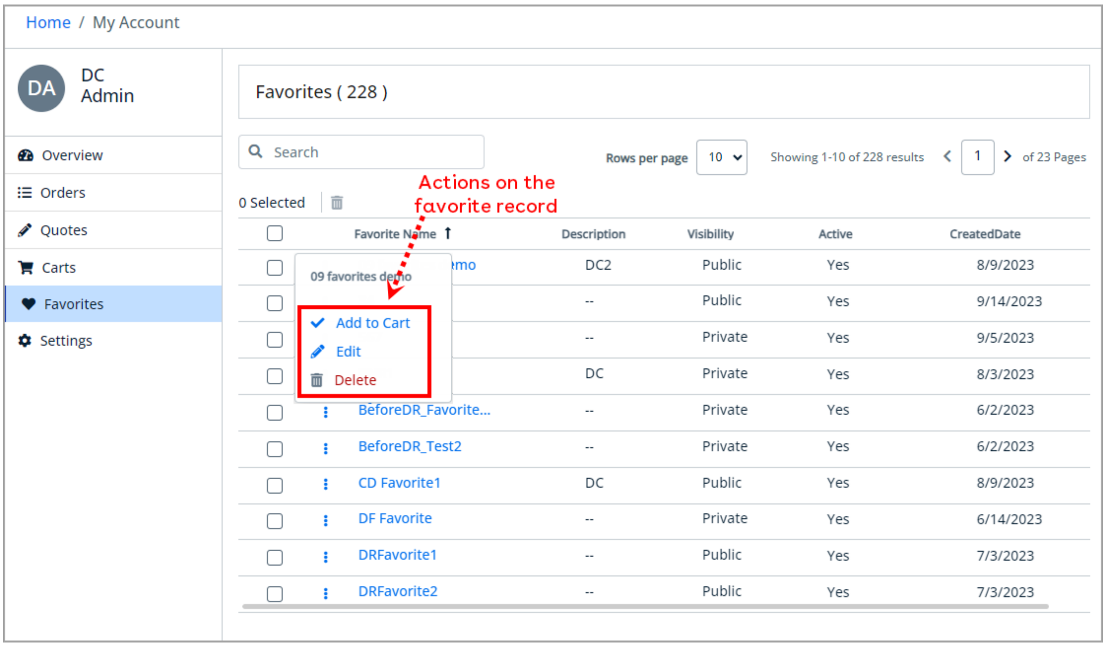
You can perform the following actions on the favorite list view:

- Search for a favorite by name from the search bar on the Favorites page.
- Sort the list by clicking the Favorite Name, Description, Visibility, Active, and Created Date column names.
- Specify how many favorites should be displayed on a single page. To enable pagination, go to the per page field on the top right bar and select a value from 10, 20, 30, or 40 quotes per page.



Each row in the favorites list allows you to perform the following actions:

- **Add favorite configuration to the Cart:** You can add any of the favorite configurations to the Cart.
    - Select a particular favorite configuration from the list > click the More (⋮) icon > select the **Add to Cart** option.
      --OR--
    - Click the **Favorite Name** link which will redirect you to the Favorite Details page, then click the **Add to Cart** button.
- **Edit a favorite configuration:** You can edit any of the favorite configurations as per your business use case. You can modify the Name, Description, and Visibility of the Favorite from the Favorite Summary section only if it is an active favorite and owned by you. All the line items in the Favorite are listed in the Line Items section.
    - Select a particular favorite configuration from the list > click the More (⋮) icon > select the **Edit** option.
      --OR--
    - Click the **Favorite Name** link which will redirect you to the *Favorite Details* page, where you can edit the favorite configuration details.
- **Delete favorite configuration(s):** You can delete single or multiple favorite configurations that you have created.
    - Select a particular favorite configuration from the list > click the More (⋮) icon > select the **Delete** option.
      --OR--
    - Select one or more favorite configurations from the list > click the **Delete** ( ) icon.



As an experienced buyer, you can also use the **Quick-Add** ( ) button to add multiple products to the cart and create quotes and orders quickly. For more information, see Using CTA (call-to-action) "Quick-Add" button.

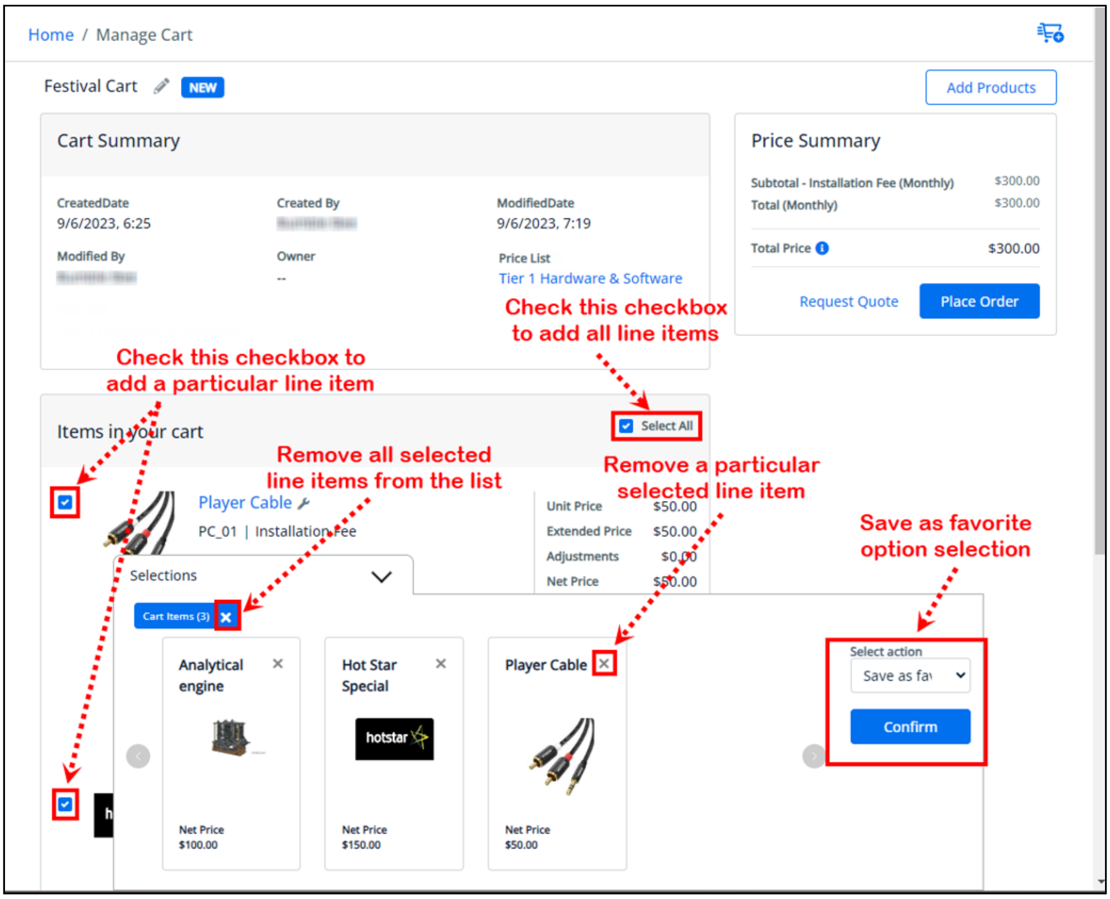
Saving Products and Cart Configuration as Favorite

The Save as Favorite feature allows logged-in accounts to save and reuse cart configurations or catalog products. This feature helps speed up the quoting process by letting you quickly add saved favorites to quotes and ensuring consistency with all selected products, options, and attributes.

Every line item on the Cart Details page and every product card on the Catalog has a checkbox. Selecting a checkbox opens a drawer with the selected items. You can use the **Select All** option to include all items or choose specific ones to save as a favorite. From the **Selection drawer**, select **Save as Favorite** and click **Confirm** to save the selected items with their configurations.

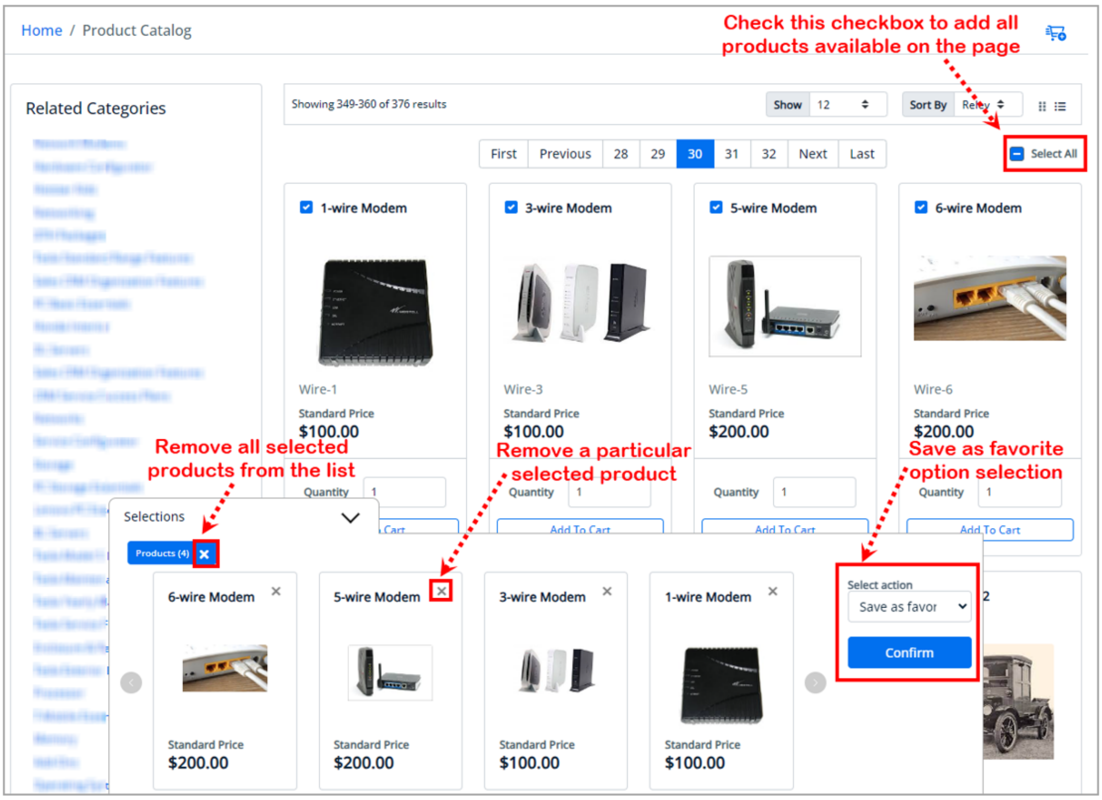
Although there is no limitation on the number of products or line items you can add for your favorite configuration, it is advisable to have a quantity of less than 100 to avoid operations failing or taking too long to complete.

Cart details page



Home / Manage Cart
Festival Cart
NEW
Add Products
Cart Summary
CreatedDate
9/6/2023, 6:25
Created By
ModifiedDate
9/6/2023, 7:19
Modified By
Owner
--
Price List
Tier 1 Hardware & Software
Price Summary
Subtotal - Installation Fee (Monthly) $300.00
Total (Monthly) $300.00
Total Price $300.00
Request Quote
Place Order
Check this checkbox to add all line items
Check this checkbox to add a particular line item
Items in your cart
Select All
Remove all selected line items from the list
Remove a particular selected line item
Save as favorite option selection
Player Cable
PC_01 | Installation Fee
Unit Price $50.00
Extended Price $50.00
Adjustments $0.00
Net Price $50.00
Selections
Cart Items (3)
Analytical engine
Net Price $100.00
Hot Star Special
hotstar
Net Price $150.00
Player Cable
Net Price $50.00
Select action
Save as fav
Confirm

Catalog



Home / Product Catalog
Check this checkbox to add all products available on the page
Related Categories
Showing 349-360 of 376 results
Show 12
Sort By
First Previous 28 29 30 31 32 Next Last
Select All
1-wire Modem
Wire-1
Standard Price $100.00
3-wire Modem
Wire-3
Standard Price $100.00
5-wire Modem
Wire-5
Standard Price $200.00
6-wire Modem
Wire-6
Standard Price $200.00
Remove all selected products from the list
Remove a particular selected product
Save as favorite option selection
Quantity 1
Add To Cart
Selections
Products (4)
6-wire Modem
Standard Price $200.00
5-wire Modem
Standard Price $200.00
3-wire Modem
Standard Price $100.00
1-wire Modem
Standard Price $100.00
Select action
Save as favor
Confirm

Selecting Save as favorite and clicking Confirm opens an **Add Favorite** popup that allows you to add a new one or update an existing favorite.

To add a new favorite, see Adding New Favorite.

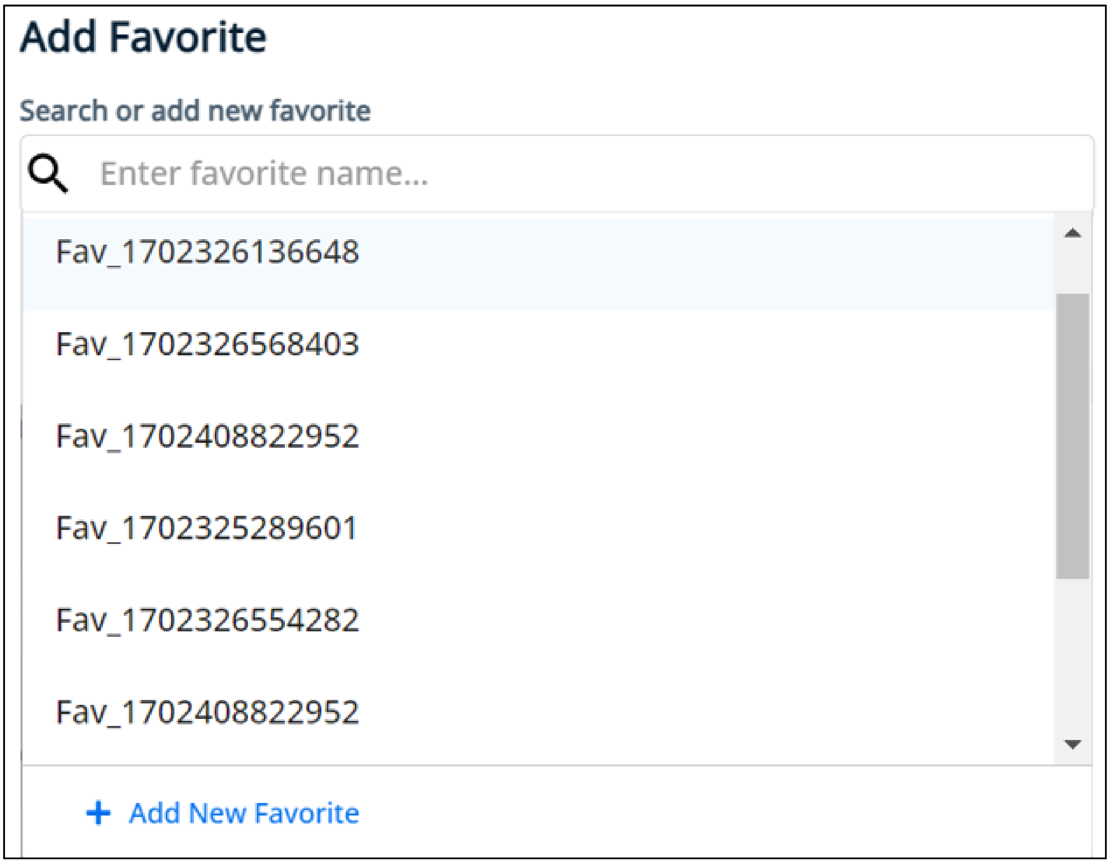
To update an existing favorite, see Updating Existing Favorite.

Adding New Favorite

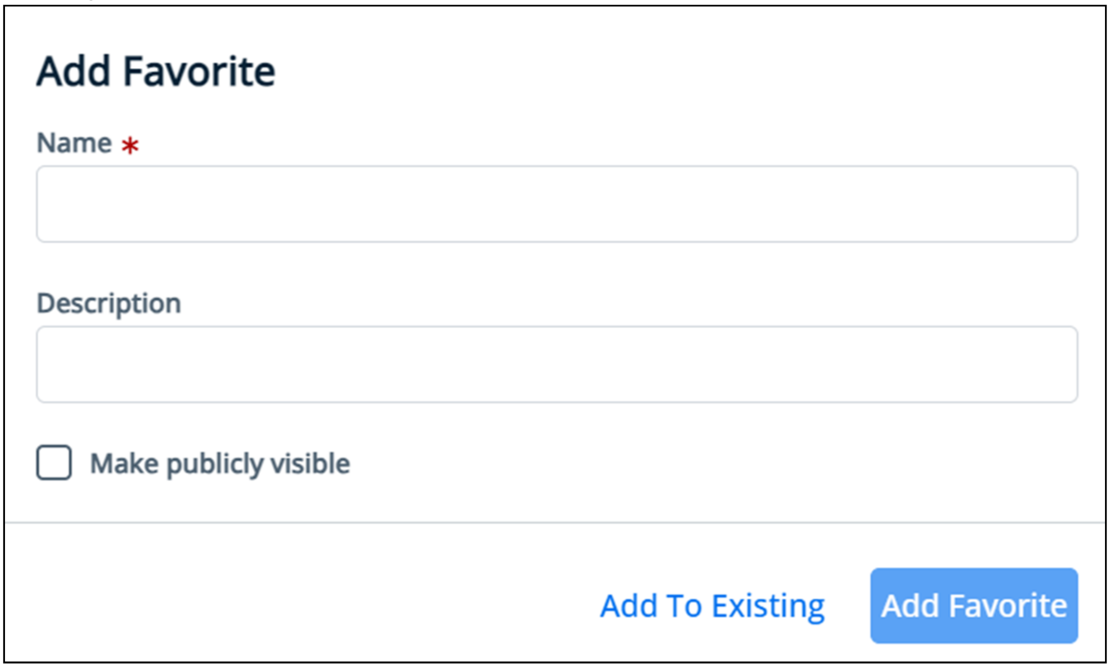
Adding a new favorite allows you to save and organize your preferred configurations or products for quick access. When you select Save as favorite and clicking Confirm, **Add Favorite** popup appears.

To add a new favorite, follow the steps below:

1. click the search bar and select **Add New Favorite** option.



2. Specify a name for the new favorite.



3. Provide a brief description.
4. To make the favorite configuration visible to all the users on the account, select Make publicly visible. Do not select this checkbox, if you want to make the favorite configuration visible only to you.
5. Click **Add Favorite** to add a new favorite to the favorite list.
   Clicking the Add To Existing button takes you back to the search popup, where you can see all the existing favorites (including public ones) that are added by other users.

Working with Favorites

Updating Existing Favorite

Updating an existing favorite lets you modify a previously saved configuration by accessing the "Add Favorite" popup. When you select Save as favorite and clicking Confirm, **Add Favorite** popup appears.

To update an existing favorite, follow the steps below:

1. Search and select the existing favorite name.
2. Click **Update** to update the existing favorite.

Working with Favorites

Working with Favorites

You can view and use favorite configurations from the My Favorites page.

The following API with the appropriate parameters is used to retrieve the list of favorites for the user. For more information, click here.

```
GET https://<URL_of_the_Instance>/api/catalog/v1/favorites
```

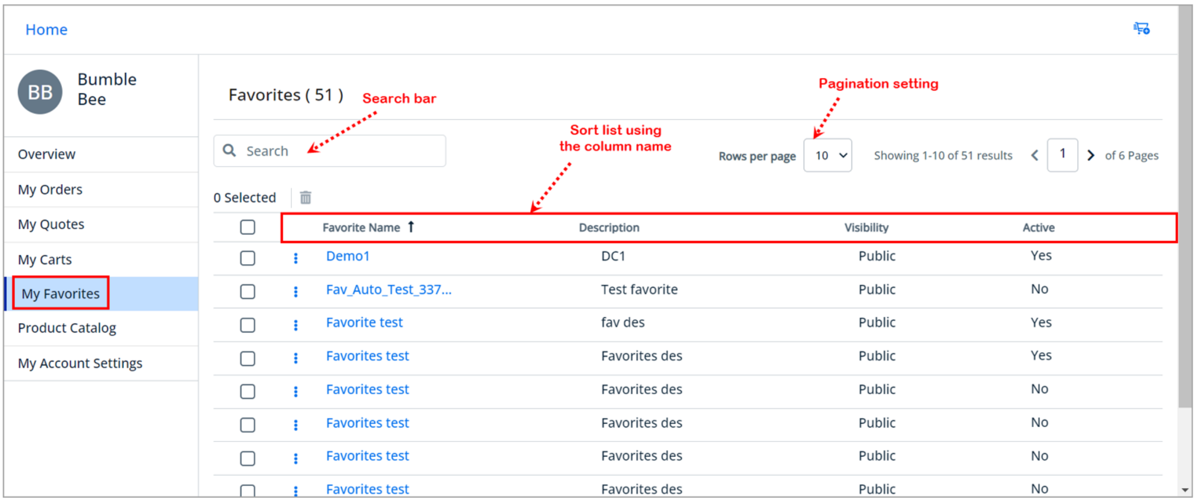
For example:

```
https://<URL_of_the_Instance>/api/catalog/v1/favorites?sort=DESC(ModifiedDate)&Page={pageNumber}&limit={pageLimit}
```

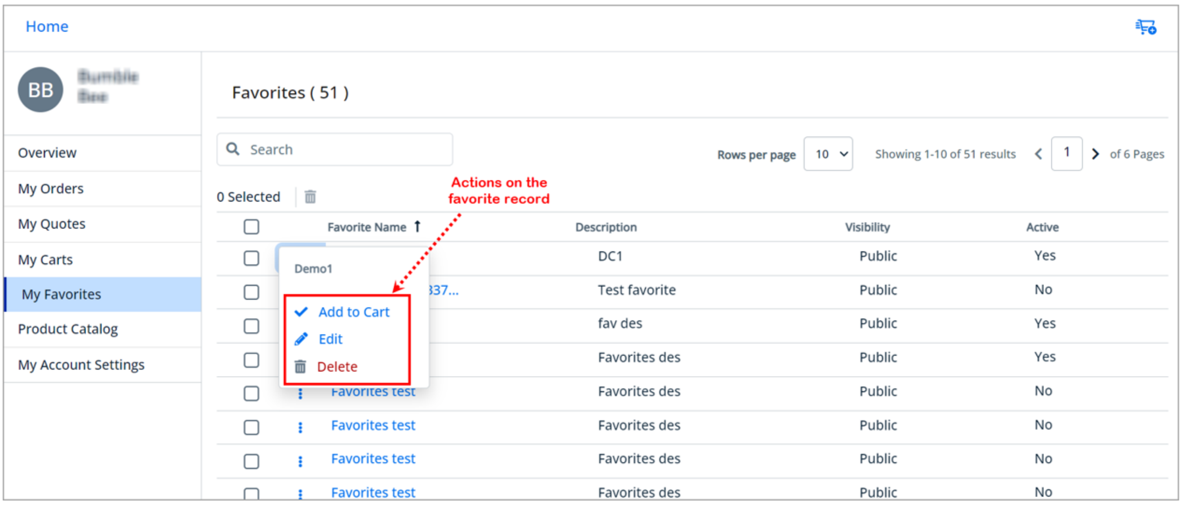
The Favorites home page lists all the favorite configurations (public and private). In the case of private favorite configurations, you can view only those private favorites that you have created as private favorite configurations. To see the details of a particular favorite configuration, click the **Favorite Name** link. On the details page, you can view the Favorite Summary and Line Items.

You can perform the following actions on the favorite list view:

- Search for a favorite by name from the search bar on the Favorites page.
- Sort the list by clicking the Favorite Name, Description, Visibility, Active, and Created Date column names.
- Specify how many favorites should be displayed on a single page. To enable pagination, go to the per page field on the top right bar and select a value from 10, 20, 30, or 40 quotes per page.



Each row in the favorites list allows you to perform the following actions:



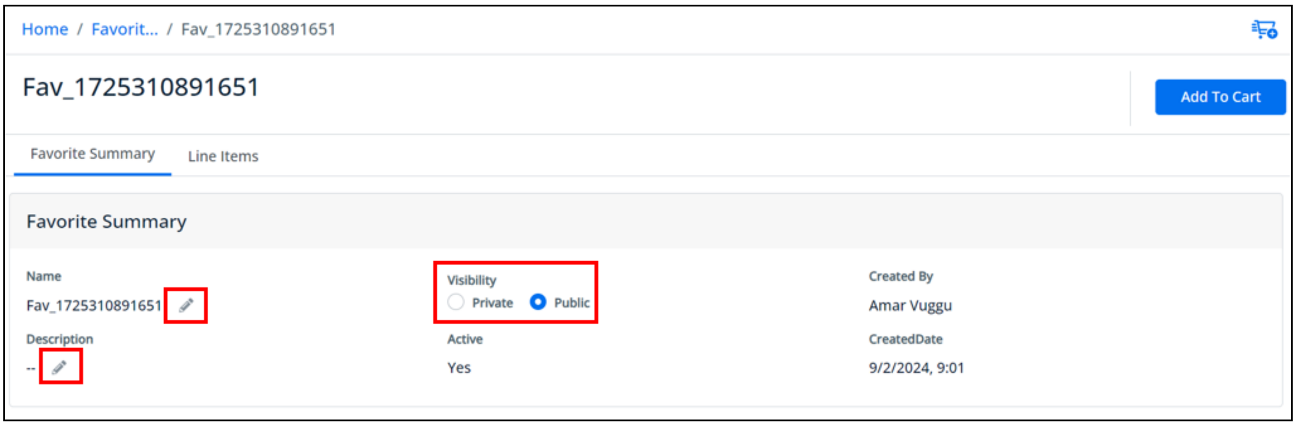
Add favorite configuration to the Cart

You can add any of your favorite configurations to the Cart.

- Select a particular favorite configuration from the list > click the More (⋮) icon > select the **Add to Cart** option or click the **Favorite Name** link which will redirect you to the Favorite Details page, then click the **Add to Cart** button.

Edit a favorite configuration

You can edit any of the favorite configurations as per your business use case. You can modify the Name, Description, and Visibility of the Favorite from the Favorite Summary section only if it is an active favorite and owned by you. All the line items in the Favorite are listed in the Line Items section.



- Select a particular favorite configuration from the list > click the More ( ) icon > select the **Edit** option or click the **Favorite Name** link which will redirect you to the *Favorite Details* page, where you can edit the favorite configuration details.

Delete favorite configuration(s)

You can delete single or multiple favorite configurations that you have created.

- Select a particular favorite configuration from the list > click the More ( ) icon > select the **Delete** option or select one or more favorite configurations from the list > click the Delete ( ) icon.

You can also use the **Quick-Add** ( ) button to add multiple products to the cart and create quotes and orders quickly. For more information, see Using CTA (call-to-action) "Quick-Add" button.

Managing Quotes

Quotes page displays a list of all quotes that you have requested and created. To view all the quotes created by you, Click the **Menu** ( ) icon > **My Account > Quotes**. You can also see the total quote number and amount at the top of the Quotes page. The total quote number and amount will change depending on the filter applied.

> ⓘ The following API with the appropriate parameters is used to retrieve the selected account's quote data. For more information, click here.
> **GET** `https://<URL_of_the_Instance>/api/quote/v1/quotes`

From the **Quotes** page, you can:

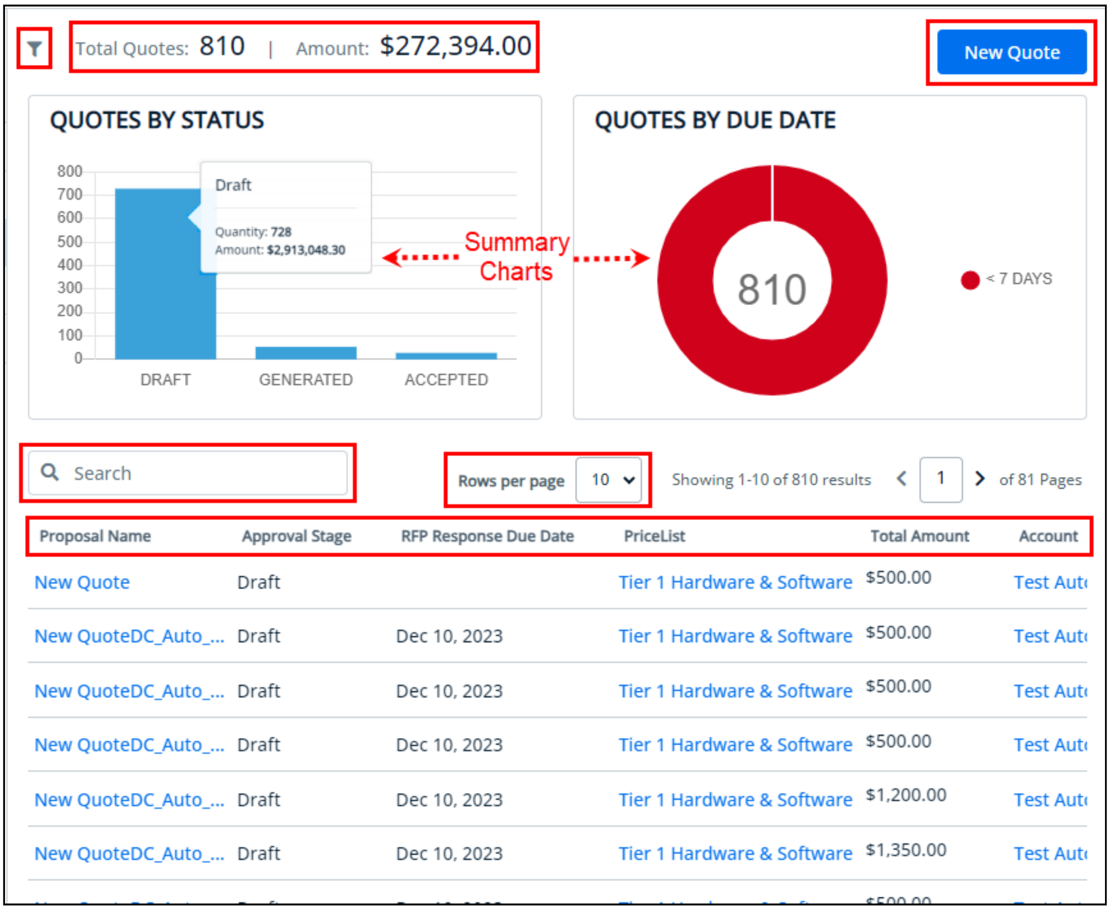
- **View summary chart**: You can view the summary chart for all of the quotes that are placed. You can also customize the chart by applying the advanced filters. **Quotes by Status** (bar chart) and **Quotes by Due Date** (pie chart) charts are available with out-of-the-box template. Hovering the mouse over a status displays the quantity and amount for that status.
- **Request a new Quote:** You can request a new quote by clicking the **New Quote** button and then adding line items (products) for the quote. For more information, see **Requesting a Quote** section below.
- **Search for a quote**: You can search for the quote to refine the quote list. Enter a keyword related to the name. It displays all quotes that contain that keyword.

> ⓘ The following API with the filter parameter is used to search for the particular quote. For more information, click here.
> **GET** `https://<URL_of_the_Instance>/api/quote/v1/quotes`
> For example: `https://<URL_of_the_Instance>/api/quote/v1/quotes?filter=eq(Account.Id:'<actual accountId>')&filter=noteq(Status:'Saved')&sort=DESC(ModifiedDate)&Page=1&limit=10`

- **Sort the quote list**: You can sort the quote list by clicking the Proposal ID, Proposal Name, Approval Stage, Price List, Account, and Last Modified Date column names.
- **Set pagination:** You can specify how many quotes should be displayed on a single page. To enable pagination, go to the per page field on the top right bar and select a value.
- **Filter the quote list**: You can sort the quote list by clicking the filter icon. The *Advanced Filters* pop-up appears. You can filter the quote list based on the following fields. You can also add multiple filter criteria by clicking the **Add Criteria** button.
  - Approval Stage
  - Bill To
  - Created Date
  - Grand Total
  - Pending Duration
  - RFP Response Due Date
  - Ship To

> ⓘ The following API with the filter, page, limit, and sort parameters is used for sorting, pagination, and filtering. For more information, click here.
> **GET** `https://<URL_of_the_Instance>/api/quote/v1/quotes`

For example: `https://<URL_of_the_Instance>/api/quote/v1/quotes?filter=eq(ApprovalStage:'Draft')&filter=eq(Account.Id:'<actual accountId>')&sort=DESC(ModifiedDate)&Page=1&limit=10`



Before placing an order, you can create and request a quote for a customer in order to get better pricing and product configuration.

After requesting a quote, you can perform the following:

- Generate a quote document.
- View and track quotes.
- Modify the quote by editing the header and line items in a requested quote. You can only add, change, or delete items from the requested quote in the draft stage.
- View and manage details of a requested quote created by the customer or created for the customer.

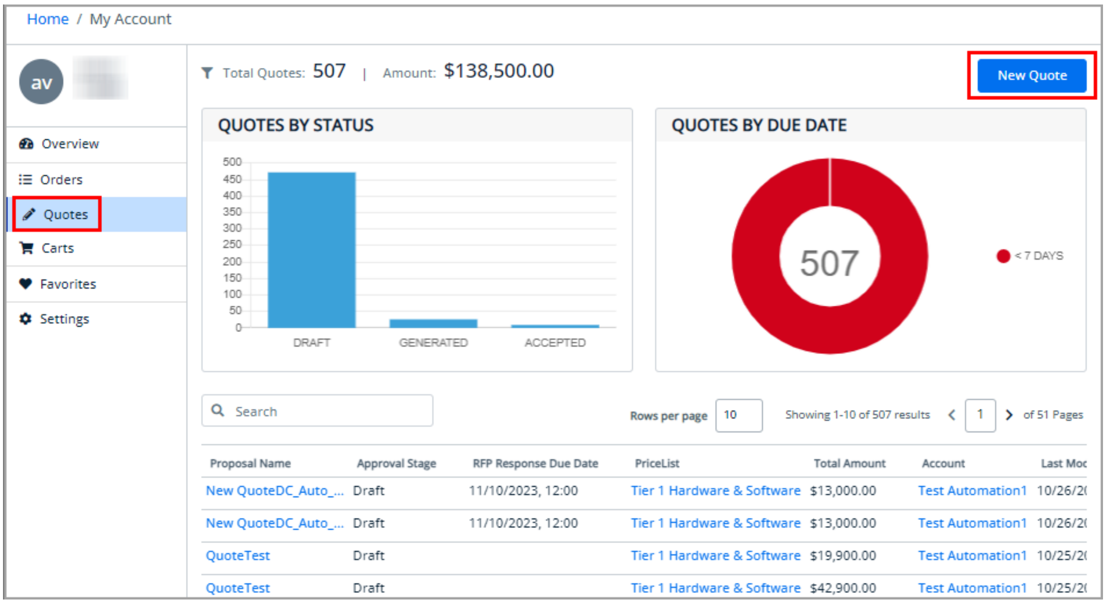
As an experienced buyer, you can also use the **Quick-Add** ( ) button to add multiple products to the cart and create quotes and orders quickly. For more information, see Using CTA (call-to-action) "Quick-Add" button.

Requesting a Quote

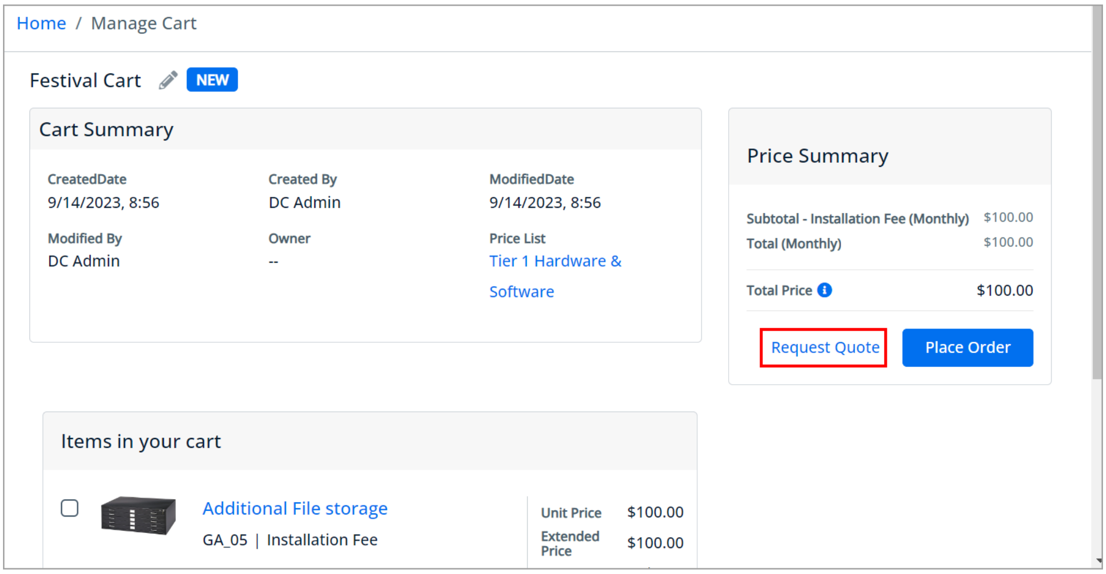
As a logged-in user, you can request a quote from the following two places:

1. Add products to the cart and request a quote by clicking the **Request Quote** button on the cart details page.
2. Create a quote by clicking the **New Quote** button on the Quotes (quote list) page and adding line items (products) for the quote.

Quotes Page

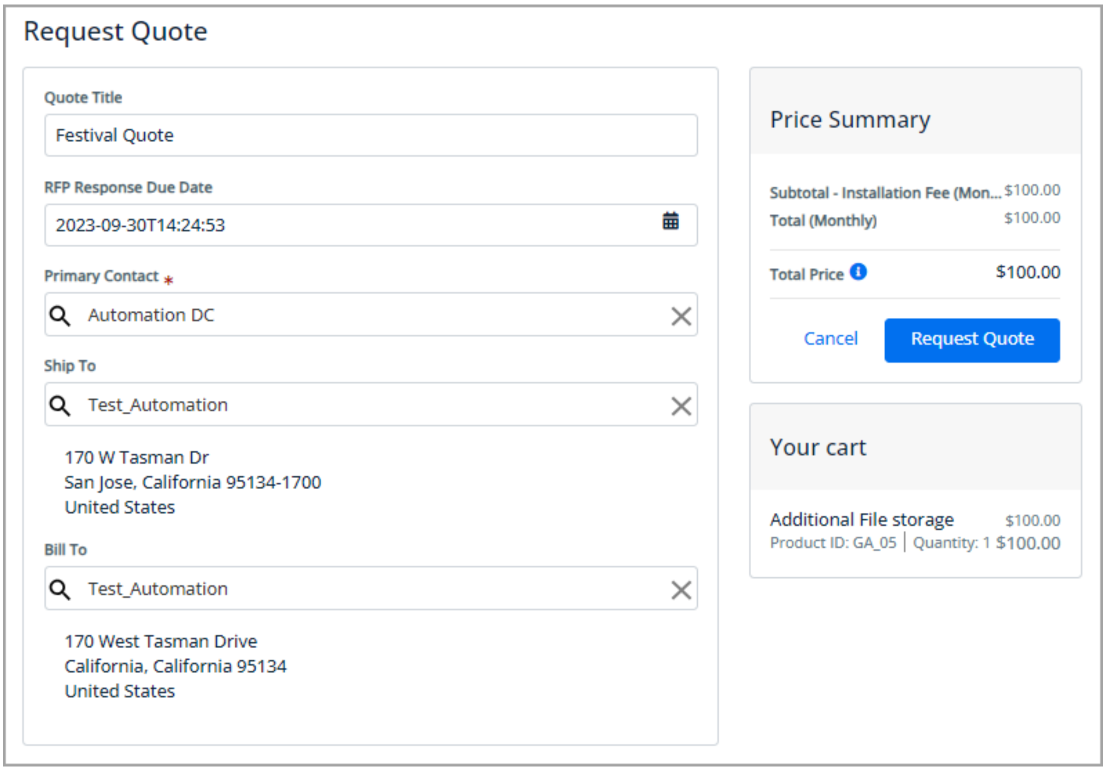


Cart Details Page



To request a quote

1. Click **Request Quote** from the Cart details page.
2. Enter the following details for the quote on the Request Quote page.



Field Name	Description
Quote Title	Enter a meaningful Quote Title. By default, it is auto-populated as New Quote.
RFP Response Due Date	Enter an RFP Response Due Date by which you are expecting a response on the quote request.
Primary Contact	Search and select the Primary Contact associated with your account.
Ship To	Shows the Ship To location of the account associated with the primary contact. You can search and select another value to update this field.

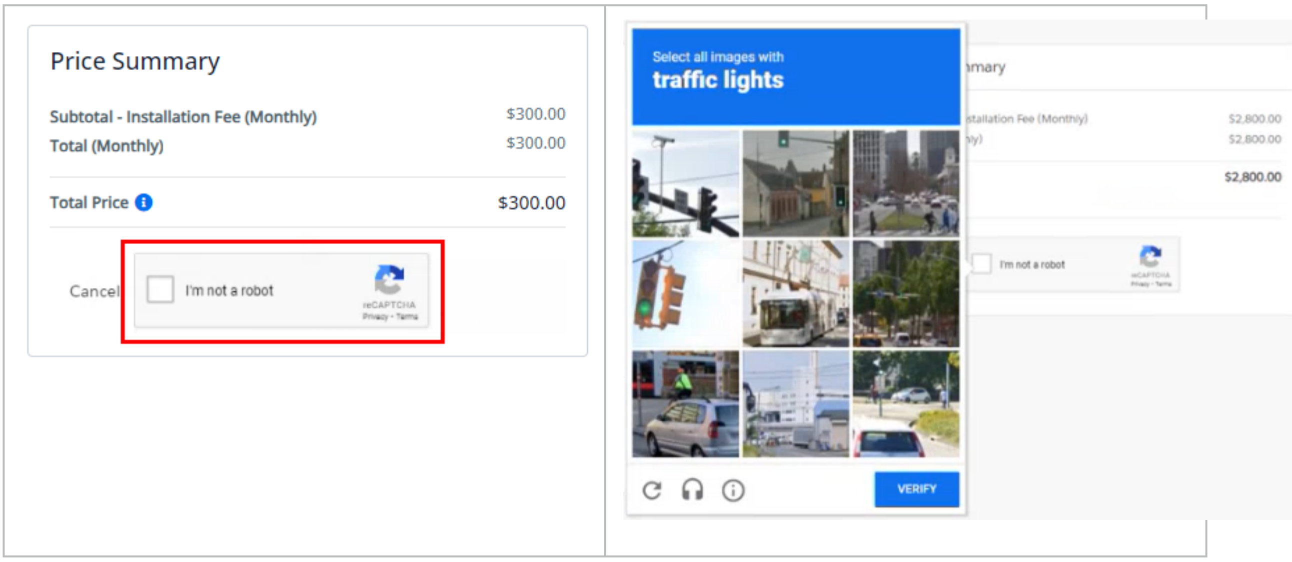
Field Name	Description
Bill To	Shows the Bill To location of the account associated with the primary contact. You can search and select another value to update this field.

3. Click **Request Quote**. If the implementor has enabled the CAPTCHA functionality, follow the next step.

> ⓘ By default, CAPTCHA functionality is not enabled. The implementor must set the *captchaSiteKey?* parameter to the template (see the Configuring Templates topic) and add the captcha property (see the image below) with the Price Summary component while configuring the template. For more information on the Price Summary component, see SDK Reference > Components section > Price Summary component.

```
<apt-price-summary [paymentState]="paymentState" [record]="cart" [form]="form" [page]="pricingSummaryType"
[showCaptcha]="true" [loading]="loading" (onSubmitOrder)="submitOrder()" #priceSummary>
</apt-price-summary>
```

4. Check the captcha checkbox labeled "I'm not a robot". Sometimes, you may need to solve a captcha puzzle after clicking the checkbox.



After successfully verifying the Captcha, a request for a quote will be sent out, and you will see a success confirmation popup after the quote has been generated.

To see more information about the quote, click **Review Your Quote**. This opens the Quote details page.

> ⓘ The following API is used for requesting a quote.
>
> **POST** `https://<URL_of_the_Instance>/api/cart/v1/carts/{cartId}/quote`

The following API with the **includes** parameter is used for reviewing the requested quote (on the Review Your Quote button). For more information, click here.
GET `https://<URL_of_the_Instance>/api/quote/v1/quotes/{Id}?includes=items`

To request a quote from the quote list page

1. Click **New Quote** from the Quote list page.
2. Enter the following details for the quote on the Place Quote page.

Field Name	Description
Name	Enter a meaningful Quote name. By default, it is auto-populated as a New Quote.
Primary Contact	Search and select the Primary Contact associated with your account.
Description	Enter the appropriate description.
Bill To	Shows the Bill To location of the account associated with the primary contact. You can search and select another value to update this field.
Ship To	Shows the Ship To location of the account associated with the primary contact. You can search and select another value to update this field.

3. Click **Request Quote.**

   The following API is used for requesting a quote. For more information, click here.
   POST `https://<URL_of_the_Instance>/api/quote/v1/quotes`

4. Click **Review Your Quote** to see the information on the quote. This opens the Quote details page.

   The following API with the **includes** parameter is used for reviewing the requested quote (on the Review Your Quote button). For more information, click here.

GET `https://<URL_of_the_Instance>/api/quote/v1/quotes/{quoteId}?includes=items`

5. Go to the Line Items section and click the **Add** button to add line items to the quote. When you click the Add button, a new Cart is created, activated, and associated with the quote.
6. On the Cart details page, click the **View All Products** link. You are redirected to the Product Catalog page.
7. Select and add product(s) to the cart. For more information, see Browsing Catalog. The product is added to the cart and you can view the complete list of products in the mini cart by clicking the cart icon on the top right.
8. Click **Finalize & Submit** to apply the changes to the cart and quote or click **Discard Changes** if you do not want to apply your changes to the cart and quote.

You can add more products and perform additional functions on the cart details page. For more information, see Working with the Main Cart.

Viewing and Modifying a Requested Quote

After requesting a quote, you can view and modify the requested quote. To view all the quotes created by you, Click the **Menu** (☰) icon > **My Account > Quotes**.

Click the Proposal Name link from the Quote list page or click the **REVIEW YOUR QUOTE** button from the *Quote Request* confirmation popup. The quote page appears where you can view and update the following details:

Quote Summary

You can update the Quote Title, RFP Response Due Date, Primary Contact, Account Name, Ship To Account, and Bill To Account.

> ⓘ The following API is used for updating the value. For more information, click here.
> **PATCH** `https://<URL_of_the_Instance>/api/quote/v1/quotes/{quoteId}`

Line Items

1. Click the **Edit** button to edit the line items in a requested quote to add, clone, modify, and delete line items.
2. After the changes are done, click **Finalize & Submit**.

> ⓘ You can also open the Product Details and Configuration by clicking the product name and wrench icon respectively.

> You can only modify the line items when the quote is in the **Draft** stage.

Attachments

If you want to upload some required document(s) in a particular order, you can upload it from the Attachments section.

> **Prerequisites**
>
> The implementer must create an **IsPrivate** custom field with a boolean data type and default value as false on the **DocumentMetadata** object. Use the Admin User Interface or the following API and sample payload: **POST** `https://<URL_of_the_Instance>/api/schema/v1/objects/{objectName}/fields`
>
> **Sample Payload**

```
{
    "FieldName": "IsPrivate",
    "DisplayName": "IsPrivate",
    "DataType": "Boolean",
    "DefaultValue": "false"
}
```

> Guest users will not be able to upload or delete any documents from the Attachments section. They can only view documents associated with the quote.

1. From the quote details page, click the **Attachments** tab.
2. Drag and drop the file or click the browse link and select the file.
   Refer to the following image for the supported file type.
3. Check the **Make visibility private** checkbox to make the attachment only visible to you on the quote details page.
4. Click **Clear** if you want to remove the selected file.
5. Click **Upload** to upload the selected file to the order.

You can File Name, Size, Type, Created By, and Created Date information under the Attachments section. The file types listed in the following image are supported. You can upload up to 28 MB of document(s).

```
{ ".doc", "application/msword" },
{ ".docx", "application/vnd.openxmlformats-officedocument.wordprocessingml.document" }
{ ".rtf", "application/rtf" },
{ ".pdf", "application/pdf" },
{ ".xml", "text/xml" },
{ ".html", "text/html" },
{ ".txt", "text/plain" },
{ ".jpg", "application/photoshop" },
{ ".jpeg", "application/photoshop" },
{ ".xls", "application/vnd.ms-excel" },
{ ".xlsx", "application/vnd.ms-excel" },
{ ".ppt", "application/vnd.ms-powerpoint" },
{ ".pptx", "application/vnd.ms-powerpoint" },
{ ".json", "application/json" },
{ ".zip", "application/zip" },
{ ".png", "image/png" }
```

The following API is used for uploading the document. For more information, click here.
POST `https://<URL_of_the_Instance>/api/document-management/v1/documents/upload`
For example: `https://<URL_of_the_Instance>/api/document-management/v1/documents/upload?objectType=order&objectId={objectID}`

Generating a Quote Document

As a logged-in user, you can generate a quote document so that you can review the proposal document and place an order. The Generate Quote button is available for a quote in Draft or Approved status.

Guest users will not be able to generate the quote document.

To generate a quote document

1. From the quote details page, click the **Generate Quote** button.
2. Select a template from the list.

   The list of templates is retrieved from the Template object, where the business object is Proposal and the IsActive flag is set to True. The following API is used to get the list of templates. For more information, click here.

GET `https://<URL_of_the_Instance>/api/data/v1/custom-objects/Template?criteria=BusinessObject=Proposal`

3. Select the document format of the file to be generated. For example: DOCX, PDF, or PDF/A.
4. Check the **Include Watermark** checkbox to include DRAFT as a watermark in the generated document.
5. Click **Generate** to initiate quote document generation. A confirmation message appears and the quote details page is displayed.

   ⓘ The following API is used to generate the document. For more information, click here.
   POST `https://<URL_of_the_Instance>/api/ingress/v2/documents/generate`

The quote stage moves from Approved to Generated, the generated quote is available under the Attachments section, and a notification email is sent to the primary contact of the quote. You can also download and delete the generated document.

ⓘ The following API is used for the email notification. For more information, click here.
POST `https://<URL_of_the_Instance>/api/email/v1/emails/bulk`

Managing Orders

You can see the order details of your orders after logging into Digital Commerce.
Orders page lists all the orders that you are working with. To view all the orders created by you, click the **Menu** (☰) icon > **My Account** > **Orders**. You can also see the total order number and amount at the top of the Orders page. The total order number and amount will change depending on the filter applied.

ⓘ The following API with the appropriate parameters is used to retrieve the selected account's order data. For more information, click here.
GET `https://<URL_of_the_Instance>/api/order/v1/orders`

From the **Orders** page, you can:

- **View summary chart**: You can view the summary chart for all of the orders that are placed. You can also customize the chart by applying the advanced filters. **Orders by**

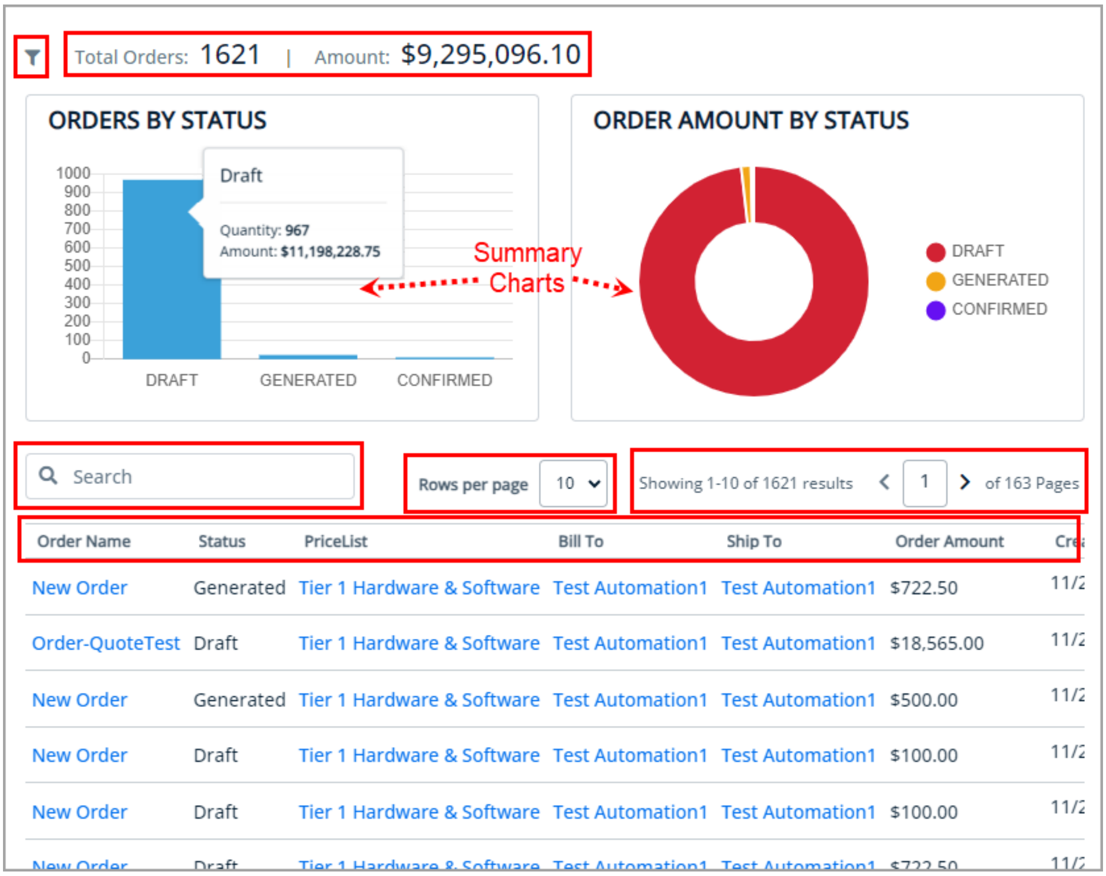
Status (bar chart) and **Order Amount by Status** (pie chart) charts are available with the out-of-the-box template. Hovering the mouse over a status displays the quantity and amount for that status.

- **Search for an order**: You can search for the order to refine the order list. Enter a keyword related to the name. It displays all orders that contain that keyword.

  > The following API with the filter parameter is used to search for the particular order. For more information, click here.
  >
  > **GET** `https://<URL_of_the_Instance>/api/order/v1/orders`
  >
  > **For example:** `https://<URL_of_the_Instance>/api/order/v1/orders?filter=eq(SoldToAccount.Id:'<soldtoaccountID>')&sort=DESC(ModifiedDate)&filter=LIKE(Name:'Test')&Page=1&limit=10`

- **Sort the order list**: You can sort the order list by clicking the column names.
- **Set pagination:** You can specify how many orders should be displayed on a single page. To enable pagination, go to the per page field on the top right bar and select a value from 10, 20, 30, or 40 orders per page.
- **Filter the order list**: You can sort the order list by clicking the filter icon. The Advanced Filters pop-up appears. You can filter the order list based on the following fields: You can also add multiple filter criteria by clicking the **Add Criteria** button.
  - Bill To
  - Created Date
  - Order Amount
  - Status

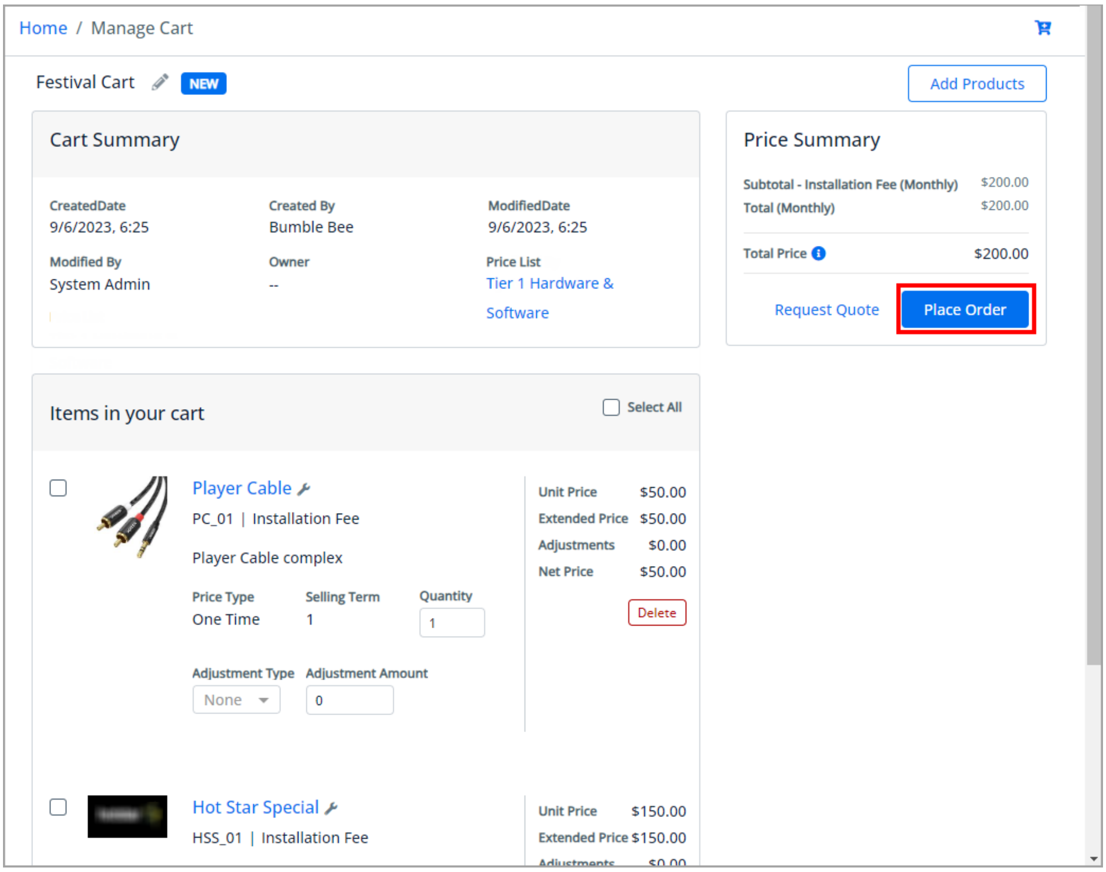
> The following API with the filter, page, limit, and sort parameters is used for sorting, pagination, and filtering. For more information, click here.
>
> **GET** `https://<URL_of_the_Instance>/api/order/v1/orders`
>
> **For example:** `https://<URL_of_the_Instance>/api/order/v1/orders?filter=eq(Status:'Draft')&filter=eq(SoldToAccount.Id:'<soldtoaccountID>')&sort=DESC(ModifiedDate)&Page=1&limit=10`



As an experienced buyer, you can also use the **Quick-Add** ( ) button to add multiple products to the cart and create quotes and orders quickly. For more information, see Using CTA (call-to-action) button.

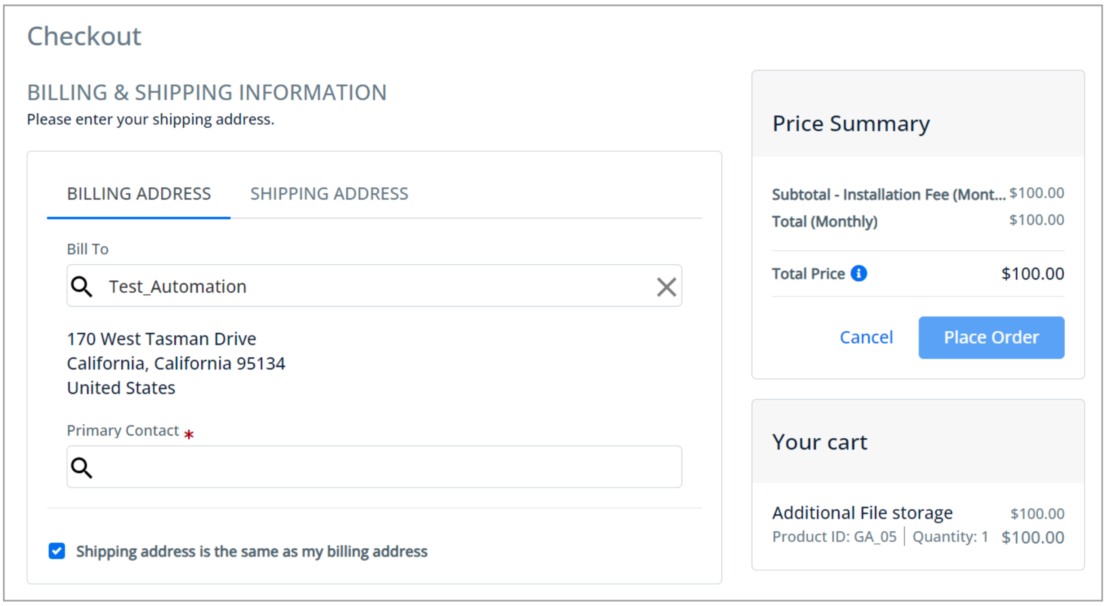
Checkout an Order

You can add products to the cart and create an order by clicking the **Place Order** button on the cart page. The Checkout page appears.



To checkout an order

1. Enter or select the following details for the order on the Checkout page; however, some of the fields have default values.



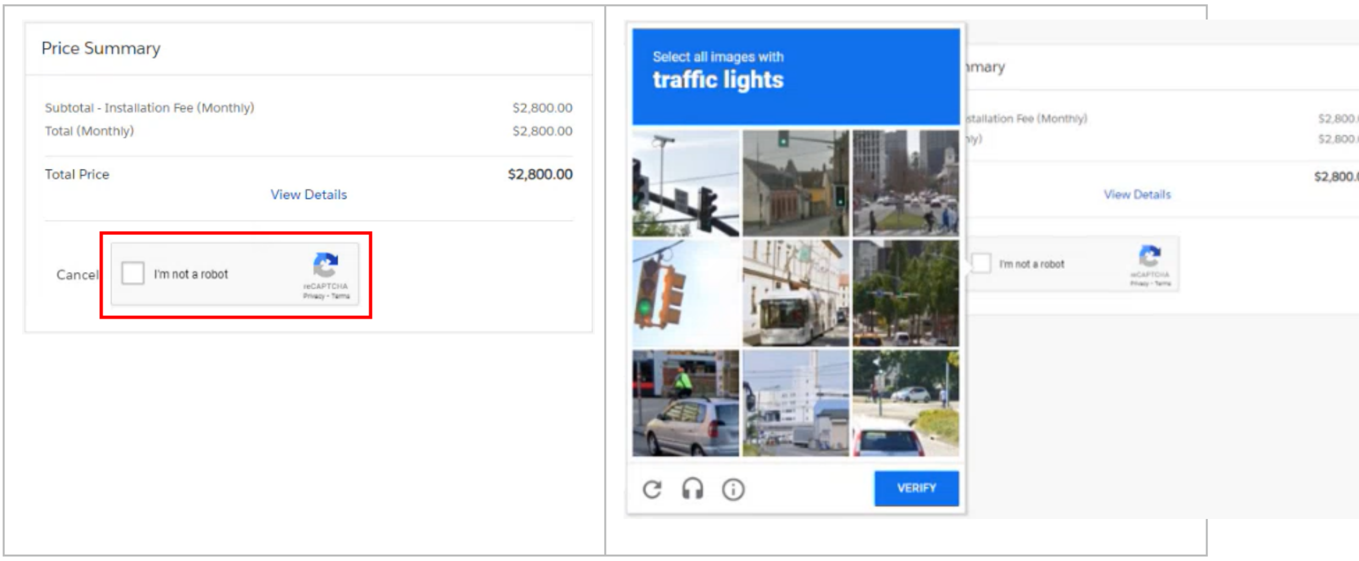
Field Name	Description
Billing Address Details	
Bill To	Shows the Bill To location of the account associated with the primary contact. You can search and select another account to update this field.
Primary Contact	Search and select the Primary Contact associated with your account.
Shipping address is the same as my billing address	Check this checkbox if you want the Shipping Address to be the same as your Billing Address.
Shipping Address Details	
Ship To	Shows the Ship To location of the account associated with the primary contact. You can search and select another account to update this field.

2. Click **Place Order**. If the implementor has enabled the CAPTCHA functionality, follow the next step.

> By default, CAPTCHA functionality is not enabled. The implementor must set the *captchaSiteKey?* parameter to the template (see the Configuring Templates topic) and add the captcha property (see the image below) with the Price Summary component while configuring the template. For more information on the Price Summary component, see SDK Reference > Components section > Price Summary component.

```
<apt-price-summary [paymentState]="paymentState" [record]="cart" [form]="form" [page]="pricingSummaryType"
[showCaptcha]="true" [loading]="loading" (onSubmitOrder)="submitOrder()" #priceSummary>
</apt-price-summary>
```

3. Check the captcha checkbox labeled "I'm not a robot". Sometimes, you may need to solve a captcha puzzle after clicking the checkbox.



After successfully verifying the Captcha, a request for an order will be sent out, and you will see a success confirmation popup after the order has been generated.

To see more information about the order, click **REVIEW YOUR ORDER**. This opens the Order details page.

> The following API is used for creating an order. For more information, click here.
>
> **POST** https://<URL_of_the_Instance>/api/cart/v1/carts/{cartId}/order
>
> The following API with the **includes** parameter is used for reviewing the created order (on the Review Your Order button). For more information, click here.
>
> **GET** https://<URL_of_the_Instance>/api/order/v1/orders/{orderId}?includes=items

Viewing and Modifying a Placed Order

After creating an order, you can view and modify some of the fields. To view all the orders created by you, click the **Menu** (☰) icon > **My Account** > **Orders**.

Click the Order Name link from the Order list page or click the **REVIEW YOUR ORDER** button from the Checkout confirmation popup. The order page appears where you can view and update the following details:

Order Summary

You can update the Primary Contact, Description, Ship To Account, and Bill To Account fields.

> The following API is used for updating the value. For more information, click here.

PATCH `https://<URL_of_the_Instance>/api/order/v1/orders/{orderId}`

Line Items

1. Click the **Edit** button to edit the line items in a created order to add, clone, modify, and delete items.
2. After the changes are done, click **Confirm Changes**.

> You can also open the Product Details and Configuration by clicking the product name and wrench icon respectively.

Attachments

If you want to upload some required document(s) in a particular order, you can upload it from the Attachments section.

> **Prerequisites**
>
> The implementer must create an **IsPrivate** custom field with a Boolean data type and default value as false on the **DocumentMetadata** object. Use the Admin User Interface or the following API and sample payload: POST `https://<URL_of_the_Instance>/api/schema/v1/objects/{objectName}/fields`
>
> **Sample Payload**
>
> ```
> {
>     "FieldName": "IsPrivate",
>     "DisplayName": "IsPrivate",
>     "DataType": "Boolean",
>     "DefaultValue": "false"
> }
> ```

> Guest users will not be able to upload or delete any documents from the Attachments section. They can only view documents associated with the order.

1. From the order details page, click the **Attachments** tab.
2. Drag and drop the file or click the browse link and select the file(s).
   Refer to the following image for the supported file type.
3. Check the **Make visibility private** checkbox to make the attachment only visible to you on the order details page.
4. Click **Clear** if you want to remove the selected file.
5. Click **Upload** to upload the selected file to the order.

You can File Name, Size, Type, Created By, and Created Date information under the Attachments section. The file types listed in the following image are supported. You can upload up to 28 MB of document(s).

```
{ ".doc", "application/msword" },
{ ".docx", "application/vnd.openxmlformats-officedocument.wordprocessingml.document" }
{ ".rtf", "application/rtf" },
{ ".pdf", "application/pdf" },
{ ".xml", "text/xml" },
{ ".html", "text/html" },
{ ".txt", "text/plain" },
{ ".jpg", "application/photoshop" },
{ ".jpeg", "application/photoshop" },
{ ".xls", "application/vnd.ms-excel" },
{ ".xlsx", "application/vnd.ms-excel" },
{ ".ppt", "application/vnd.ms-powerpoint" },
{ ".pptx", "application/vnd.ms-powerpoint" },
{ ".json", "application/json" },
{ ".zip", "application/zip" },
{ ".png", "image/png" }
```

The following API is used for uploading the document. For more information, click here.

POST `https://<URL_of_the_Instance>/api/document-management/v1/documents/upload`

For example: `https://<URL_of_the_Instance>/api/document-management/v1/documents/upload?objectType=order&objectId={objectID}`

You can only modify the line items when the order is in the **Draft** stage.

Managing Assets

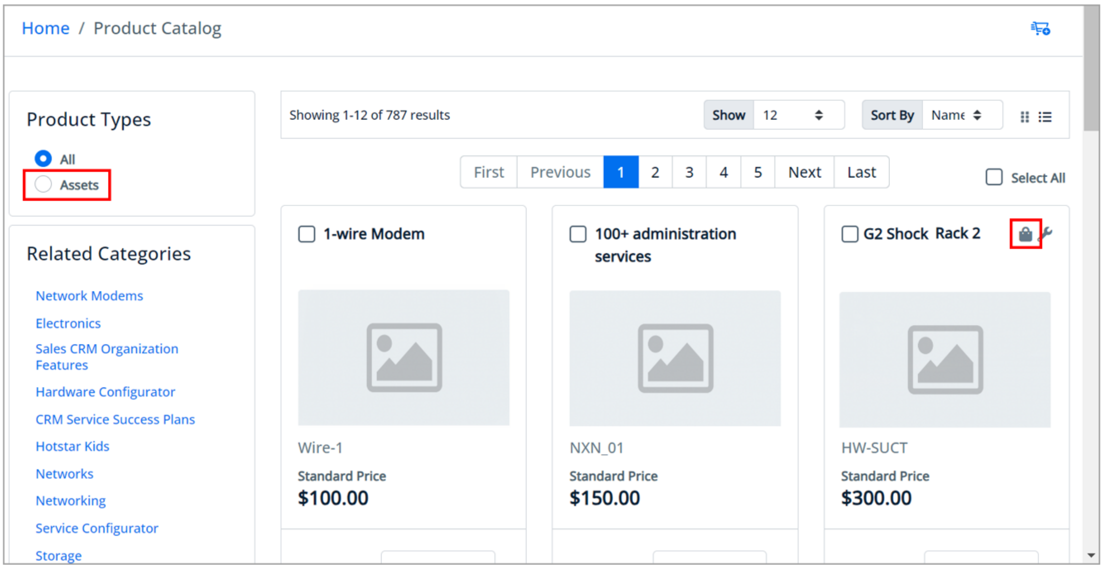
When you accept a quote, the application generates an order. When you activate the order, it creates new assets. Assets are the products or services that a customer has bought. Asset-based ordering (ABO) manages the products and services of customers throughout their life cycles. ABO enables businesses who sell and manage subscriptions, recurring licenses, support contracts, or modular solutions to manage these transactions more efficiently after the initial purchase. Furthermore, it improves opportunities to manage renewals, upsells, and cross-sells.

> **Prerequisites for Asset Actions**
> - An order is activated. For more information on how to activate the order, see Activating Orders.
> - The generated asset data is synced with the Conga Revenue Lifecycle Platform. For more on creating and managing object and field mappings, see Creating and Managing Object Mappings.

The Installed Products and Product Catalog sections allow you to access asset products and perform ABO actions.

Product Catalog Page

To identify the asset products on the Product Catalog page, the application displays the installed product ( ) icon on the asset product card. You can also select the Product Types as **Assets** on the Product Catalog page to see only asset products.



Installed Products Page

The Installed Product page or Assets page lists all the installed products of the selected account. The Assets list shows the assets with the following details:

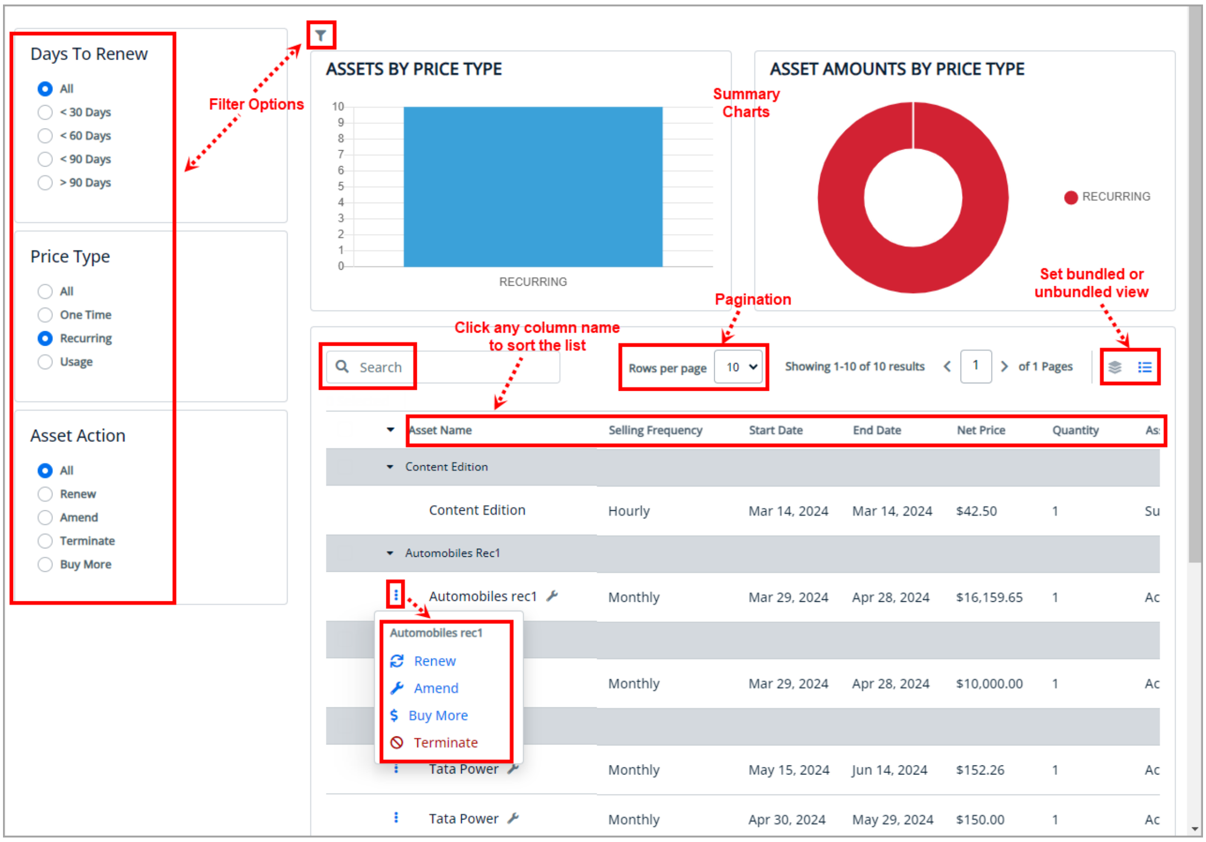
- Asset Name
- Selling Frequency

- Start Date
- End Date
- Net Price
- Quantity
- Asset Status
- Price Type

> ⓘ The implementor can add or remove standard or custom fields on the grid.

From the **Installed Products** page, you can:

- **View summary chart**: You can view the summary chart for all of the assets that you have. You can also customize the chart by applying the advanced filters. **Assets By Price Type** (bar chart) and **Assets Amounts By Price Type** (pie chart) charts are available with out-of-the-box template. Hovering the mouse over a status displays the quantity and/or amount for that price type.
- **Search for an asset**: You can search for the asset to refine the asset list. Enter a keyword related to the name. It displays all assets that contain that keyword.
- **Sort the asset list**: You can sort the asset list by clicking the column names.
- **Set pagination:** You can specify how many assets should be displayed on a single page. To enable pagination, go to the per page field on the top right bar and select a value from 10, 20, 30, or 40 orders per page.
- **Set view**: You can set a bundled or unbundled view for the asset list.
- **Filter the list**: You can use the following filters available on the page to find a particular asset:
    - Days to Renew
    - Price Type
    - Asset Action
    - Advanced Filter



You can perform the following ABO actions:

- Renew
- Terminate
- Buy More
- Amend

- The implementor can customize the labels for all out-of-the-box asset action buttons (Renew, Terminate, Buy More, and Amend). For more information on how to set the custom label, see Configuring Templates > assetActionLables parameter.
- The **Buy Another** action is available for all asset products, and it functions identically to the Add to Cart button. You can utilize this action when you intend to purchase the asset as a new product.
- When you try to do an ABO action on a product that is associated with multiple assets from the Product Catalog page, you are redirected to the Installed Products page, where you can perform the ABO action on the required asset.

Renewing an Asset

Renewal is the most common and efficient method of retaining current customers while driving growth and revenue for your company. By extending an agreement, asset renewals reduce the scope of pricing problems. When you renew an asset, you are essentially regenerating the asset life cycle for a new duration. You can renew a standalone, standalone-with-attributes, or bundle-with-configurations asset from the Product Catalog page.

> ⓘ The Renew action is only available for products/assets with Price Type set to Recurring/Usage. If the asset's status isn't activated or if it's already in the cart for another action based on assets, then the Renew action will be disabled.

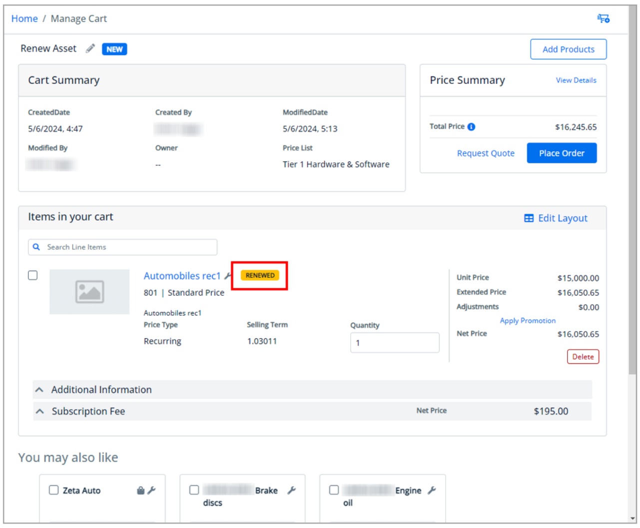
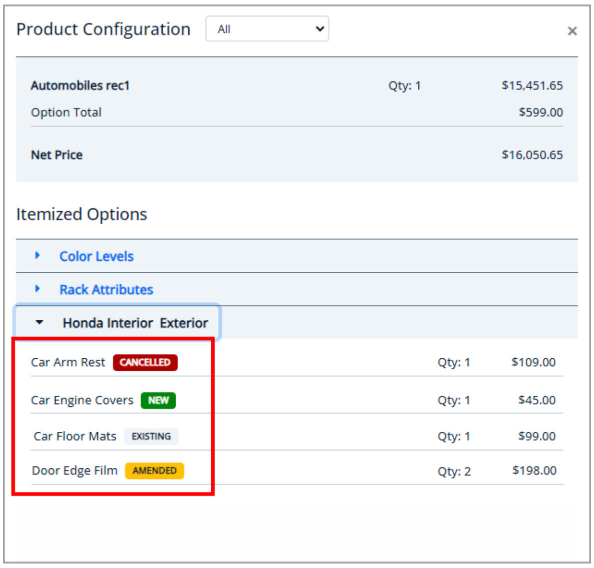
To renew an asset

1. Go to the asset product.
2. Click the **Renew** action on the product card.
3. Adjust the renewal end date or use the existing term to renew the product.
4. Click **Renew**. The product is added to the cart.
5. Go to the cart and make any necessary modifications to the asset.
6. Go to the product configuration page to change the configuration (change the quantity, add and remove bundles, options, option groups, etc.).
7. Follow the quote and order flow.

When the order is activated, renewal assets are generated. Refer to the different line statuses while adding and removing bundle, option, and option group:

- The overall status for the asset product is **RENEWED** on the Cart, Quote, and Order details page.
- You cannot change one-time options. The line's status is displayed as Existing for those options.
- You can switch options, and select additional options & option groups, and attributes.
- When you change an option, the existing option's line status is displayed as Cancelled, and the newly selected option's line status is set to New. The cart displays both options with Line Status = Cancelled and New with the newly selected option within the option group.
- When you select a new option without switching an existing option, the existing line's status is displayed as Existing, and the newly selected option's line status is set to New.

- When you update the quantity of the existing option, the existing option Line Status = Amended.

<table>
<tr><th>Asset Product Status on the Cart, Quote, and Order details page</th><th>Line Status (bundle, option, and option group)</th></tr>
<tr><td>
</td><td>
</td></tr>
</table>

Buy More Assets

Using the Buy More action, you can buy more standalone, standalone-with-attributes, or bundle-with-configurations assets from the Product Catalog page.

> The Buy More action will be disabled If the asset's status isn't activated or if it's already in the cart for another action based on assets.
> To ensure the line status is incremented, set the EnableOneTimeChange flag to True in asset settings.

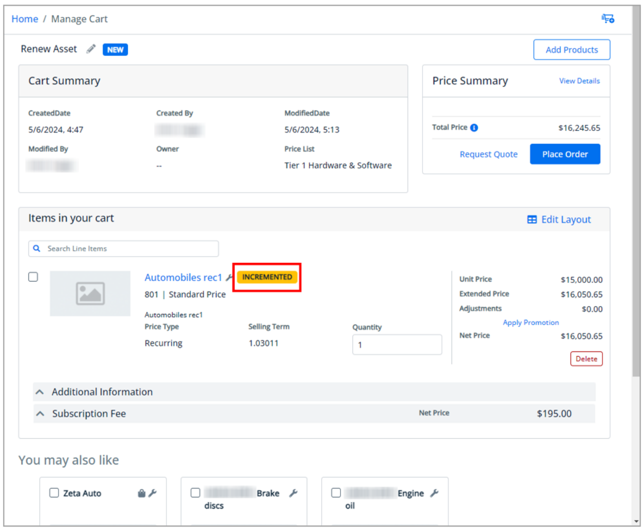
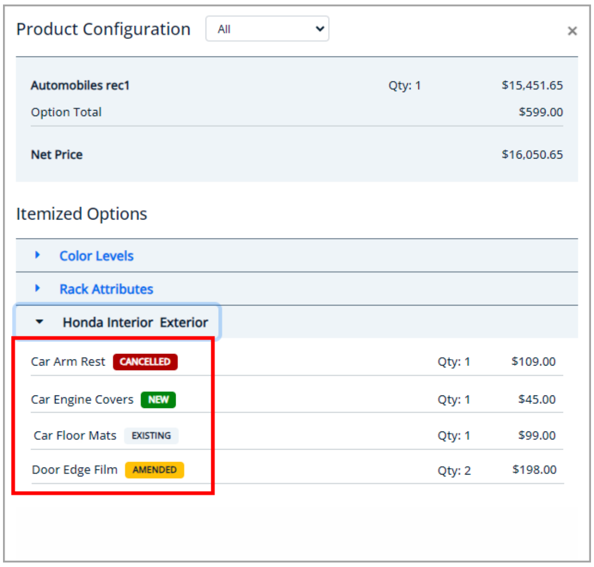
To buy more an asset

1. Go to the asset product.
2. Click the action dropdown button and select the **Buy More** action on the product card.
3. Review the product name, selling frequency & term, start & end date, quantity, net unit price, net price, and charge type.
4. Select the new start and end dates (for bundle products) and enter the extra quantity you wish to buy.

5. Click **Buy More**. The product is added to the cart.
6. Go to the cart and make any necessary modifications to the asset.
7. Go to the product configuration page to change the configuration (change the quantity, add and remove bundles, options, option groups, etc.).
8. Follow the quote and order flow.

The overall status for the line item is shown as **INCREMENTED** on the Cart, Quote, and Order details page. Refer to the different line statuses while adding and removing bundle, option, and option group:

- You cannot change one-time options. The line's status is displayed as Existing for those options.
- You can switch options, and select additional options & option groups, and attributes.
- When you change an option, the existing option's line status is displayed as Cancelled, and the newly selected option's line status is set to New. The cart displays both options with Line Status = Cancelled and New with the newly selected option within the option group.
- When you select a new option without switching an existing option, the existing line's status is displayed as Existing, and the newly selected option's line status is set to New.
- When you update the quantity of the existing option, the existing option Line Status = Amended.

Asset Product Status on the Cart, Quote, and Order details page	Line Status (bundle, option, and option group)
	

Amending an Asset

You can change the configuration for an existing bundle subscription from the Product Catalog page when it's time for renewal or even in the middle of your subscription term. This applies to both Recurring Asset products (Bundles) and Usage Standalone Asset products. This enables you to tweak how your recurring bundle products or standalone usage assets work.

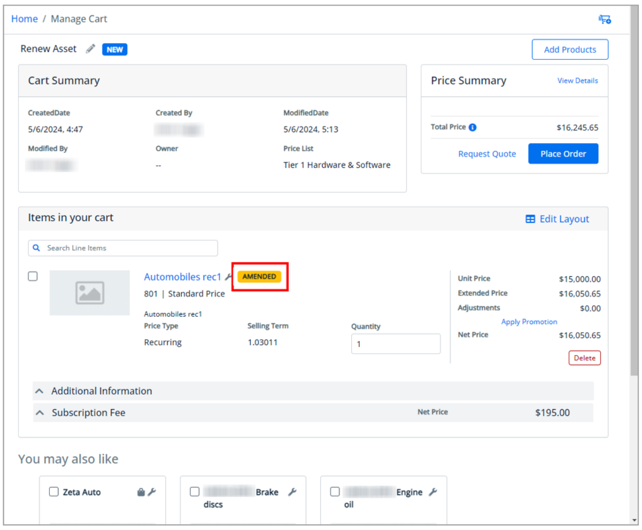
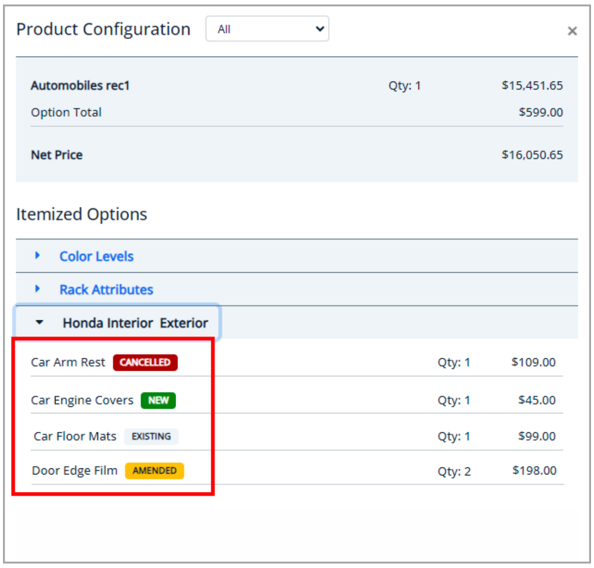
> ⓘ The Change Configuration action is only available for products/assets with Price Type set to Recurring/Usage and with an asset status other than cancelled.

To amend an asset

1. Go to the asset product.
2. Click the action dropdown button and select the **Amend** option on the product card.
3. Review the product name, start & end date, quantity, and price.
4. Click **Amend**.
5. The product is added to the cart and you are redirected to the product details page where you can change the configuration (change the quantity, add and remove bundles, options, option groups, etc.).
6. Go to the cart and follow the quote and order flow.

When the order is activated, amended assets are generated. Refer to the different line statuses while adding and removing bundle, option, and option group:

- The overall status for the asset product is **AMENDED** on the Cart, Quote, and Order details page.
- You cannot change one-time options. The line's status is displayed as Existing for those options.
- You can switch options, and select additional options & option groups, and attributes.
- When you change an option, the existing option's line status is displayed as Cancelled, and the newly selected option's line status is set to New. The cart displays both options with Line Status = Cancelled and New with the newly selected option within the option group.
- When you select a new option without switching an existing option, the existing line's status is displayed as Existing, and the newly selected option's line status is set to New.
- When you update the quantity of the existing option, the existing option Line Status = Amended.

<table>
<tr><th>Asset Product Status on the Cart, Quote, and Order details page</th><th>Line Status (bundle, option, and option group)</th></tr>
<tr><td>
</td>
<td>
</td></tr>
</table>

Terminating an Asset

Using the Terminate action, you can cancel a standalone, standalone-with-attributes, or bundle-with-configurations asset from the Product Catalog page. This means you can end an asset's term before it is completed, giving you flexibility even if you are in the middle of your selling period.

> The Terminate action is only available for products/assets with Price Type set to Recurring/Usage. If the asset's status isn't activated or if it's already in the cart for another action based on assets, then the Terminate action will be disabled.

To terminate an asset

1. Go to the asset product.
2. Click the action dropdown button and select the **Termination** action on the product card.
3. Review the product name, selling frequency & term, start & end date, quantity, net unit price, net price, and charge type.
4. Select the termination date.
5. Click **Terminate**. The product is added to the cart.
6. Go to the cart and follow the quote and order flow.

The overall status for the line item is shown as **CANCELLED** on the Cart, Quote, and Order details page. You can only delete Cancelled assets from the cart details and mini cart.

Using CTA (call-to-action) "Quick-Add" button

The **Quick-Add** button is a feature commonly found in e-commerce platforms or software used for managing orders and quotes. Its purpose is to simplify the process of adding multiple products to a cart or creating quotes/orders efficiently. This feature is especially useful for experienced buyers who frequently need to add multiple products to their orders or quotes in a time-efficient manner, as it eliminates the need for manual searching and clicking on individual product listings.

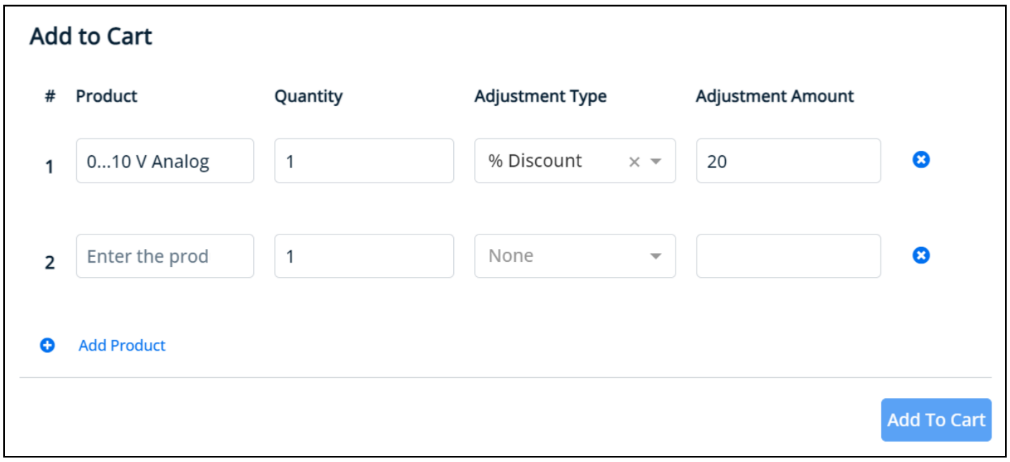
> It's important to note that the specific implementation of the Quick-Add button can vary depending on your business use case and flow. This button is available on every page with an out-of-the-box template; however, the SDK allows the implementer to do the following:
>
> - Change the placement, appearance, and feel.
> - Embedded the button on any of the pages.

- Configure an input component either *a predefined list of products*, *a popup where you can add required products*, or *an input form* for the **Quick-Add** button.
    - Set any of the flow for the *popup* component:
        - Allow the buyer to enter the product code and If the product code does not match any other products or the buyer enters 0 or a negative quantity, the application displays an error message.
        - Based on the product code buyer enter the application will display an auto-suggest selector, from which the buyer can choose the appropriate product. If the entered product code is wrong, the application displays the message "No product found".
    - Set any of the flow for the *predefined list of products* component:
        - Predefine the products and quantities, skip the popup, and add them to the cart after clicking the Quick-Add button.
        - Predefine products and/or quantities, then open the popup with all of those products, where buyers can add, update, and delete any.
- Change the input field such as product name, product code, product description, and any standard or custom fields (maximum 4 cart line item fields) for the popup option. By default, the product code is provided as an input field.
- Change the input fields (for a quote or order creation popup) up to 10 fields (standard or custom) from the Quote or Order object.

Quick Add Operation

By default, the *Popup* component is available with the out-of-the-box implementation. Refer to the following steps to add multiple products to the cart using this component:

1. On any of the page, click the **Quick-Add** ( ) button.
2. Select the **Quick Add** option. The *Add to Cart* popup appears.

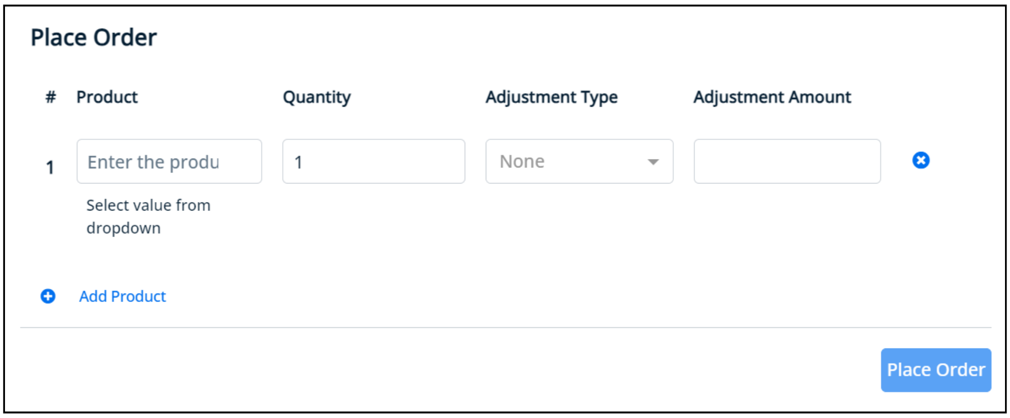


3. In the *Product* field, search by product code and select it.
   The implementer can change the input field with the product name, product description, and any standard or custom fields.
4. Enter the quantity, adjustment amount, and adjustment type.
5. Click + Add Product link to add more products. To remove, click remove icon.
6. Click **Add To Cart** to add product(s) to the cart.

Quick Order Operation

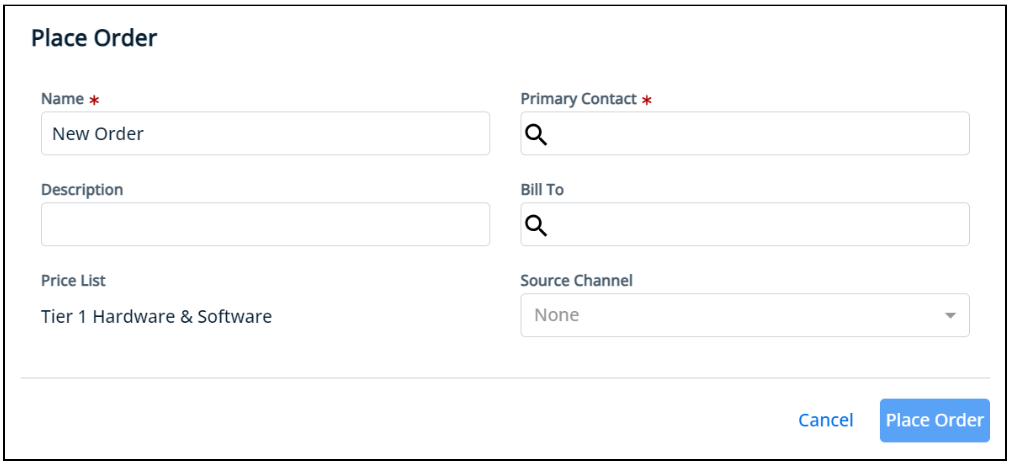
By default, the *Popup* component is available with the out-of-the-box implementation. Refer to the following steps to add multiple products to the cart and create an order using this component:

1. On any of the page, click the **Quick-Add** ( ) button**.**
2. Select the **Quick Order** option. The *Place Order* popup appears.



3. In the *Product* field, search by product code and select it.
   The implementer can change the input field with the product name, product description, and any standard or custom fields.
4. Enter the quantity, adjustment amount, and adjustment type.
5. Click + Add Product link to add more products. To remove, click remove icon.
6. Click **Place Order**.

7. Enter the required details for the order.



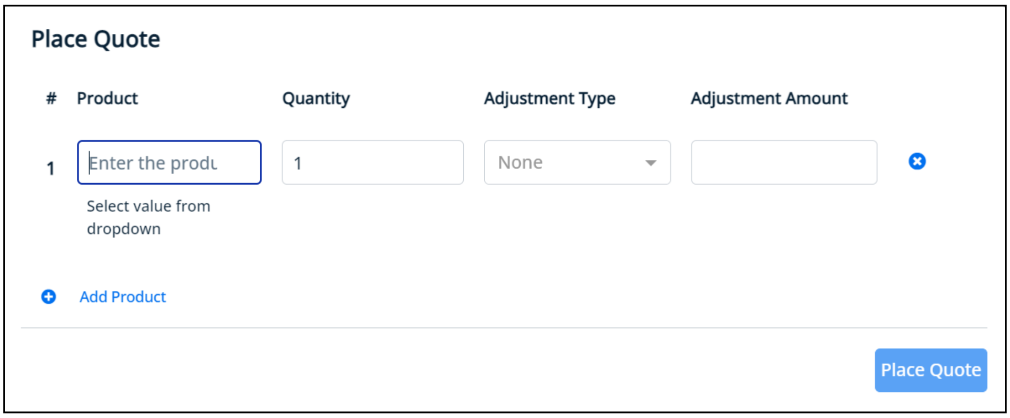
   For input fields, the implementer can specify up to 10 fields (standard or custom) from the Order object.
8. Click **Place Order**.

You will see a success confirmation popup. To see more information about the order, click **VIEW YOUR ORDER**. This opens the Order details page.

Quick Quote Operation

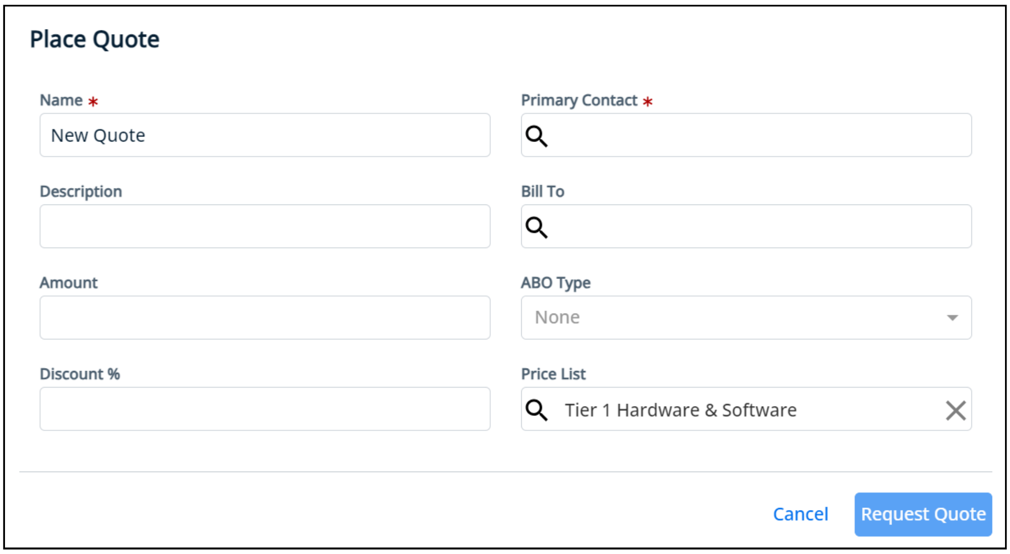
By default, the *Popup* component is available with the out-of-the-box implementation. Refer to the following steps to add multiple products to the cart and create a quote using this component:

1. On any of the page, click the **Quick-Add** ( ) button**.**
2. Select the **Quick Quote** option. The *Place Quote* popup appears.



3. In the *Product* field, search by product code and select it.
   The implementer can change the input field with the product name, product description, and any standard or custom fields.
4. Enter the quantity, adjustment amount, and adjustment type.
5. Click + Add Product link to add more products. To remove, click remove icon.

6. Click **Place Quote**.
7. Enter the required details for the quote.



   For input fields, the implementer can specify up to 10 fields (standard or custom) from the Quote object.
8. Click **Request Quote**.

You will see a success confirmation popup. To see more information about the quote, click **VIEW YOUR QUOTE**. This opens the Quote details page.

Digital Commerce SDK

This section describes the APIs and UI component references used to build a Digital Commerce storefront for your customers.

Topic	Description
What's Covered	This section is designed to provide information related to reference templates, base libraries, models, components that can be inherited and reused. This section also provides information related to Services that suffice most of the business logic. For example: Create Order, Create Quote, and more.
Primary Audience	The intended audience is the developer assigned for creating and maintaining new storefronts on a Salesforce org using Conga packages.
Updates	For a comprehensive list of updates for each release, see What's New in Digital Commerce Documentation.
Other Resources	• See Digital Commerce for Administrators for implementation and deployment procedure. • See Digital Commerce for Users for basic admin tasks and end-user experience. • See Digital Commerce for REST API Developers for details of the CPQ REST APIs consumed by Digital Commerce.

Refer to the following topic for more information on SDK:

- SDK Reference

SDK Reference

Digital Commerce for REST API Developers

In this section, you learn about Conga CPQ APIs which help you, as the implementer, build omni-channel buying experiences for your end users. These users can be of different personas and therefore have different buying habits. For example, they can be sales persons who are typically the employees of the sell-side organization helping users with quotes and orders. Similarly, they can be your channel partners who also assist the end users they are serving in turn. There can be direct buying behaviors as well typically done by self-service users who are browsing through your web store.

Conga CPQ APIs also help you set up your sell-side experience (admin interface) which would typically be used by your product and pricing masters to set up and administer your catalog and pricing information. Conga CPQ has a single set of APIs with a single data model that provides data accuracy across your entire organization and reduces the total cost of ownership.

Topic	Description
What's Covered	This section is designed to provide administrators with information on the micro-service architecture that enables commerce into any part of an application.
Primary Audience	Admin users responsible for installing, implementing and deploying the Digital Commerce solution.
Updates	For a comprehensive list of updates for each release, see What's New in Digital Commerce Documentation.
Other Resources	• See Digital Commerce for Administrators for implementation and deployment procedure. • See Digital Commerce for Users for basic admin tasks and end-user experience. • See Digital Commerce SDK for technical instructions on the installation and setup of a Digital Commerce storefront.

Select one of the following topics for more information:

- Digital Commerce API Reference

Digital Commerce API Reference

> The Conga Partner Commerce application makes use of the Conga CPQ APIs.

For more information, see Conga CPQ API Reference and Conga CPQ Use Cases.

Digital Commerce Features by Release

Review the latest Digital Commerce Features by Release document.

- Features by Release

Features by Release

This document contains an overview of features introduced in each major release of Digital Commerce on Conga Platform. For more information, see Digital Commerce on Conga Platform Features by Release.

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