Conga Order Management

202410.2.0 Preview Release

Get early access to the latest features and improvements.

Table of Contents

Learn to manage the life of the generated order before it creates or updates an asset.

Release Notes

Review the latest TurboEngines release notes that describe the system requirements and supported platforms, new features, enhancements, resolved issues, and known issues.

- 202410.2.0 Release Notes

202410.2.0 Release Notes

In these release notes, you can find new features and enhancements and fixed and known issues for the Order Management 202410.2.0 release. For documentation updates, see What's New in Order Management 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 Order Management in this release.

Editing Order Details from the User Interface

You can now use the Edit button to edit the information in various fields on the Order Details page.

For more information, see the Order Details Page.

Fixed Issues

There are no fixed issues in this release.

Known Issues

There are no known issues in this release.

DOC ID: OMRLP202410.2.0RN20241111

About Order Management

An order is a document that serves as a confirmation of a purchase created for a customer before delivering goods or services. Conga Order Management allows customer sales and customer support representatives to manage the life of the generated order before it creates or updates an asset. Order Lifecycle Management offers a common, streamlined process for managing orders regardless of the channel used for their creation – direct sales, partner sales, telesales, digital commerce, and Electronic Data Interchange EDI – through the lifecycle of the order through fulfillment.

The three main stages of the lifecycle are:

- Order Capture: In this stage, users can create direct orders through the Order Management interface, create customer purchase orders from a quote, and create digital commerce orders.
- Order Change: In this stage, users can make changes to the configuration, pricing, shipping, promotions, change or cancel in-flight orders, and reorder before the order has created or updated an asset.
- Order Fulfillment Tracking: In this stage, the order is released to multiple fulfillment systems and locations. Order fulfillment can be tracked and managed at the order and order line item level.

Conga Order Management allows users to integrate with external systems, including ERP, logistics and manufacturing, accounting and finance, and warehouse management.

Advanced features within Order Management include the design of custom validation and enrichment rules for purchase orders, as well as automation of in-flight order changes.

Conga Order Management allows a user to perform the following tasks:

- Managing order lifecycle and status
- Creating direct orders
- Creating partial orders from a customer price agreement (Quote/Agreement)
- Managing in-flight order changes and cancellation
- Managing distributed order fulfillment
- Activating an order
- Billing for an order
- Managing customer purchase orders
- Creating partial and split sales orders from customer purchase orders
- Creating data enrichment and validation rules for partial orders

Conga currently supports order creation through direct and partner sales and digital commerce interfaces. From the Order Management interface, customer support representatives can create orders on behalf of customers.

Key Terminology

It is important to understand how terms are used when working with Conga CPQ.

Term	Description
ABO	Asset-based ordering (ABO) functionality enables the customers to manage their existing subscriptions or install base using actions such as change, renew, swap, and terminate.
Administrators	Individual responsible for installing, configuring, and maintaining Order Management software, including creating direct orders, customer purchase orders, and managing partial order fulfillment and automation.
Assets	Assets define a purchased product or service. An asset is associated with an account. After being processed and fulfilled, the line items associated with new quotes, agreements, or orders result in the creation of new assets, which can then be viewed or managed from the customer’s account.
Amend Order	An action a user can take from the order record page. You can use Amend Order to create a new version of the Order classified as an amendment with changes to the field values of the order.
Attributes	Features of a product, such as color, size, weight, and more.
Bundled Products	A combination of standalone products that offer added value to the customer while increasing overall sales.
Cart	A product and pricing view for the user to review all configuration and pricing information at a glance.
Catalog	A view that allows hierarchical categorization of products for users to search through and add to their configuration.
Clone	To replicate a field, record, template, etc.
Clone Order	An action a user can take from the order record page which creates a copy of the order record.

Term	Description
Contract Price List	A price list that helps the customer keep track of specific price agreements as applicable for that account.
Customer Purchase Order	A customer document that represents the initial offer of negotiated types, quantities, and prices for products or services. Customer Purchase Orders can be created by sales users or administrators as sales orders for long-term contracts.
In-Flight Order	The flow status of an order that is in the process of fulfillment.
Order	A document that serves as a confirmation of a purchase created for a customer before delivering goods or services. The Order object is used in Order Management to capture and track orders created from quotes, agreements, or other sources, such as customer purchase orders.
Order Fulfillment Line Items	A line item on the order record that comprises order fulfillment information for the record. Order fulfillment line items are displayed in the Order Fulfillment Line Items related list.
Order Line Item	A line item on the order record corresponding to a product, bundle, or service that is part of the order. Order line items are displayed in the Order Line Items related list.
Order Line Item Status	A column on the Order Line Items related list. This status refers to the current status of the corresponding line item. The possible status values are: *PartiallyFulfilled, InFulfilment, Pending, Draft, Accepted, In-Amendment, BeingAmended, Superseded, Activated, Pending Cancellation, BeingCancelled, Cancelled,* and *Fulfilled.*
Order Number	The unique ID of an order.
Order Source	A field on the order record that specifies the source from which an order is created. For example: Account, Quote, or an Agreement.
Order Status	A field on the order record that denotes the status of an order that you have created or updated. The possible status values are: *PartiallyFulfilled, InFulfilment, Pending, Draft, Accepted, In-Amendment, BeingAmended, Superseded, Activated, PendingCancellation, BeingCancelled, Cancelled,* and *Fulfilled.*

Term	Description
Partial Order	An order placed against a price agreement or customer purchase order for a partial amount of the committed quantities captured for an order.
Price Agreement	An agreement associated with a generated contract price list that represents the negotiated pricing and quantity commitments for one or more configurations of products and services.
Price Lists	Containers of items that are grouped in a price list. A price list controls which products are visible to the end user. A price list contains several price list items; each linked to a product. A product can be set up with one or more price list items.
Price Matrix (Matrices)	These are an advanced pricing concept used to define tiered pricing paradigms, or complex pricing structures with multiple criteria. Common examples are pricing tiers for a product based on user count or particular customer or transactional dimensions.
Price Rule	Represents a single rule in a price ruleset.
Price Rule Sets	Price Rulesets are a mechanism to allow particular families, categories or groupings of products to have either line item pricing adjustments applied or summary pricing adjustments applied. Typical examples of these are volume discounting rules or promotional pricing rules.
Product	A product or service that can be sold on its own as a standalone item, an option of other products, or as part of a bundled product.
Product Attribute Group	Represents a product attribute group that contains attributes shared by products.
Product Attribute Value	Represents the attribute values for a product class. For example, color has attribute values such as red, green, blue, orange and so on.
Product Group	A logical grouping of one or more product records. This construct allows you to create combinations of products with similar characteristics/qualities for use in a Rule.

Term	Description
Quote or Proposal	A structured definition of a prospective sale that contains product configurations, pricing, and customer opportunity information.
Standalone Products	Refers to a device or software that is self-contained, one that does not require any other devices or software to function.

For more information about terms used with Conga products, see Conga Product Glossary.

What's New in Order Management Documentation

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

202410.2.0

Document	Publication Date	Topic	Description
202410.2.0	23 Nov 2024	Order Details Page	Revised the topic to include a new section for editing order details.

202410.1.0

Document	Publication Date	Topic	Description
202410.1.0	No Deployment	Order Line Item Details Page	Revised the topic to include a new section for editing order line items.

202409.2.0

Document	Publication Date	Topic	Description
202409.2.0	26 Oct 2024	Activating an Order	Revised the topic to include a new section for activating order line items.

202409.1.0

Document	Publication Date	Topic	Description
202409.1.0	01 Oct 2024	Logging in to Order Management	New Topic. New feature for this release.
		About Order Management User Interface	New Topic. New feature for this release.
		Order Details Page	New Topic. New feature for this release.
		Order Line Items Page	New Topic. New feature for this release.
		Order Line Item Details Page	New Topic. New feature for this release.
		Activating an Order	New Topic. New feature for this release.

Order Management for Administrators

This guide is designed to provide administrators with information on signing into Conga Order Management on the Conga Platform so they can configure the org to use by sales and customer support representatives. This guide covers the most common use cases for Conga Order Management Administration and assumes a level of basic familiarization with Conga CPQ on the Conga Platform.

Signing Into Conga Revenue Life Cycle Platform

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

This approach eliminates creating new login credentials specifically for the Conga Platform application. Instead, you can utilize your existing credentials from trusted third-party identity providers or your SAML username for Signin. For more information, refer to Logging Into Conga Revenue Lifecycle Platform.

Prerequisites

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

To Sign-in to the Conga Revenue Lifecycle Platform

1. Open the Conga Revenue Lifecycle Platform URL in the web browser. For example, *https://<org Instance URL>.congacloud.io*.

It will redirect you to the Conga Platform login screen.

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

   Conga Platform supports the following identity providers:
   - Microsoft
   - Salesforce
   - Salesforce Sandbox
   - Dropbox
   - Conga IDP

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

   If you forgot your password, follow the selected Identity Provider or Single Sign-On process to reset your password.

Order Management for Users

The guide is designed to provide customer sales and support representatives with information for managing the life of a generated order before it creates or updates an asset. This guide covers the major features that are provided with the Conga Order Management license, including changes to in-flight orders, partial orders from contract price agreements, and management of customer purchase orders. Many of the topics in this guide cover tasks that can be considered part of an overall workflow for Conga purchase and revenue management products – therefore familiarity with Conga Configure Price Quote (CPQ) products are highly encouraged to understand and execute Order Management concepts and tasks.

Topic	Description
What's Covered	This guide walks sales users through the Order Management workflow and lifecycle, from the generation of order to creation of assets, fulfillment tracking, and integration with downstream services. It provides conceptual information, step-by-step instructions, and use cases for the features provided by Conga Order Management.
Primary Audience	• Customer Support Representative • Sales Representative
Updates	For a comprehensive list of updates to this guide for each release, see the What's New in Order Management Documentation topic.
Other Resources	• Conga Order Management for Administrators: Refer to this guide for installing and setting up Order Management in your organization. • Conga Order Management Release Notes: Refer to this guide for the new feature, enhancements, resolved, and known issues. • Conga Order Management for SOAP API Developers: Refer to this guide for documentation of public-facing SOAP APIs for Order Management. • CPQ for Administrators: Refer to this guide for setting up products, price lists, and constraint rules.

This guide describes the following tasks:

- Managing orders in the Quote-to-Cash Process
- Managing order lifecycle and status
- Creating direct orders for accounts
- Creating partial orders from customer price agreements (quote/contract)
- Managing in-flight order changes and cancellation
- Managing distributed order fulfillment
- Activating an order
- Billing for an order
- Creating customer purchase orders

Select one of the following topics for more information:

- Logging in to Order Management
- About Order Management User Interface
- Activating an Order
- Order Details Page
- Order Line Items Page
- Order Line Item Details Page

Logging in to Order Management

Log in to the Conga Platform to access Conga Order Management.

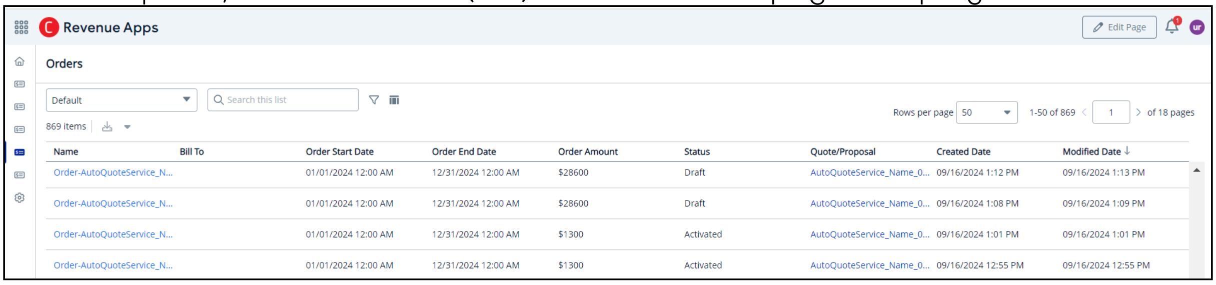
Before you log in to Conga Order Management, make sure you meet the following criteria.

- You have onboarded your Salesforce org to the Conga Platform.
- You have administrative privileges.
- You have Conga Platform login credentials provided by Conga.

To log in to Conga Order Management On the Conga Platform

1. Click the login URL provided by Conga.
2. Select the Identity provider (IDP) (Salesforce or Salesforce Sandbox or Conga IDP) based on the environment in which your org has been onboarded.
   The login page opens.
3. Enter the username and password, and click **Log in.**
   Launch your Conga Experience Page is displayed.

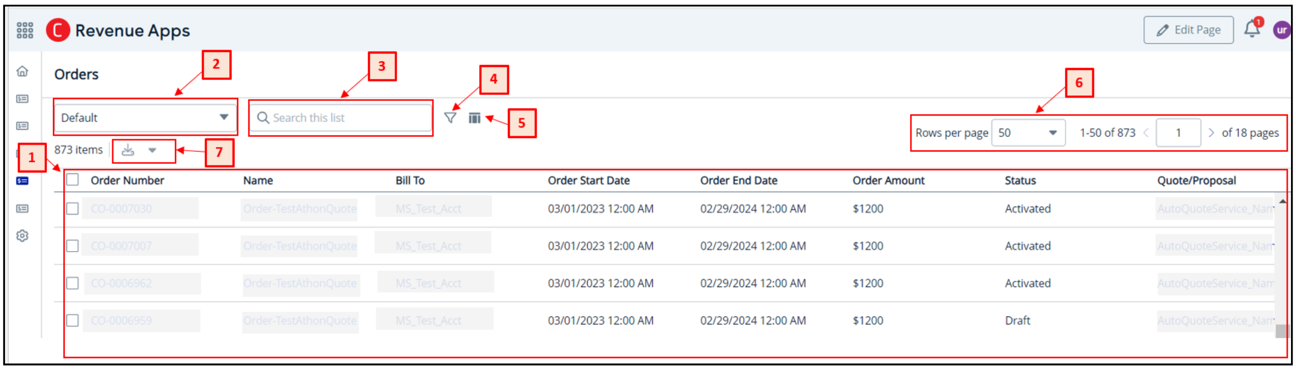
4. Click the App Launcher ( ) icon from the top-left corner > Revenue Apps or Click **Revenue Apps** on the welcome page. A default Proposals page is displayed.
5. In the left panel, click the **Orders** ( ) icon. The Orders page is displayed.



Now that you have logged in, know more About Order Management User Interface.

About Order Management User Interface

When you launch the Order Management user interface, the Orders page is displayed. The Orders page is the starting point of various functions in the application. It enables you to access the list of orders; and perform activities like Searching, Filtering, Sorting, View Settings, and Pagination.



Number	Description
1	A list of orders with default column view. If you are a new user accessing the Orders UI on the Conga platform the first time, you see a blank page. You can see the following columns as default view settings: • Order Number • Name • Bill To • Order Start Date • Order End Date • Order Amount • Status • Quote/Proposal • Created Date • Modified Date
2	Default and personalized column list view.
3	Basic Search to retrieve required orders using order number or order name as search parameters. • To search an order number, enter the exact order number in the search box. • To search an order name enter the search term in the search box.
4	Advanced filter to achieve greater selectivity and granularity in the basic search results.
5	View settings to change the default column view.
6	Pagination to set the number of rows to display on the page. By default, you can sort 10, 20, 30, 50, and 100 orders per page using the **Rows per page** drop-down. This feature works in association with the search and filter functions to display search records per page. You can use the **<** and **>** buttons to move to the next or the previous pages. You can also jump to a certain page using the page search component.
7	Export icon to export the file in CSV or Excel format.

From this page, you can:

- Create a personalized column list view.
- Create an advanced filter.
- Change the default view settings.

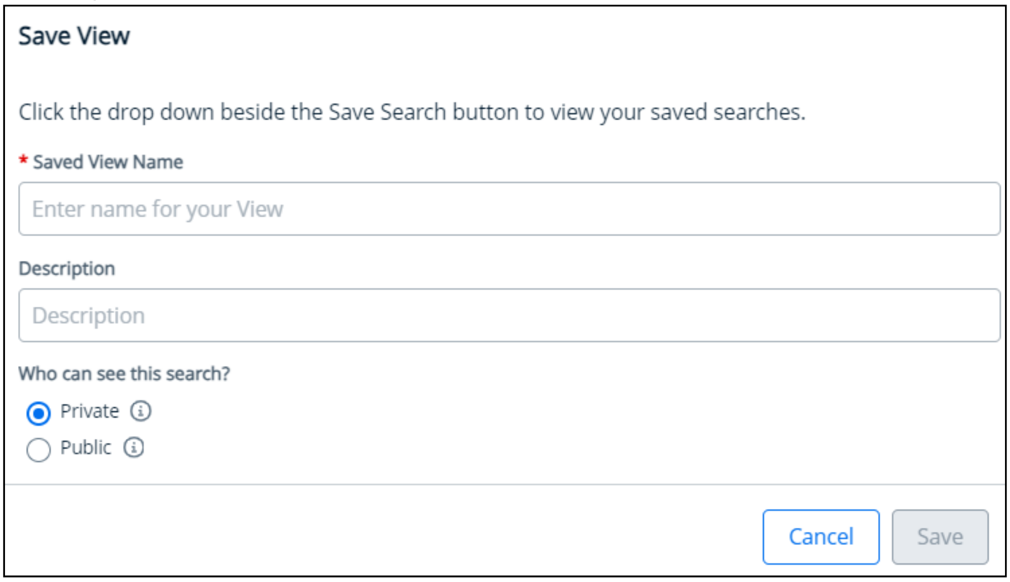
- Export the files.
- Sort search results and lists.

From this page, you can navigate to the order details page by clicking the order number.

Creating Personalized Column List View

You can create a personalized column list view from the user interface.

To Create a Personalized Column List View

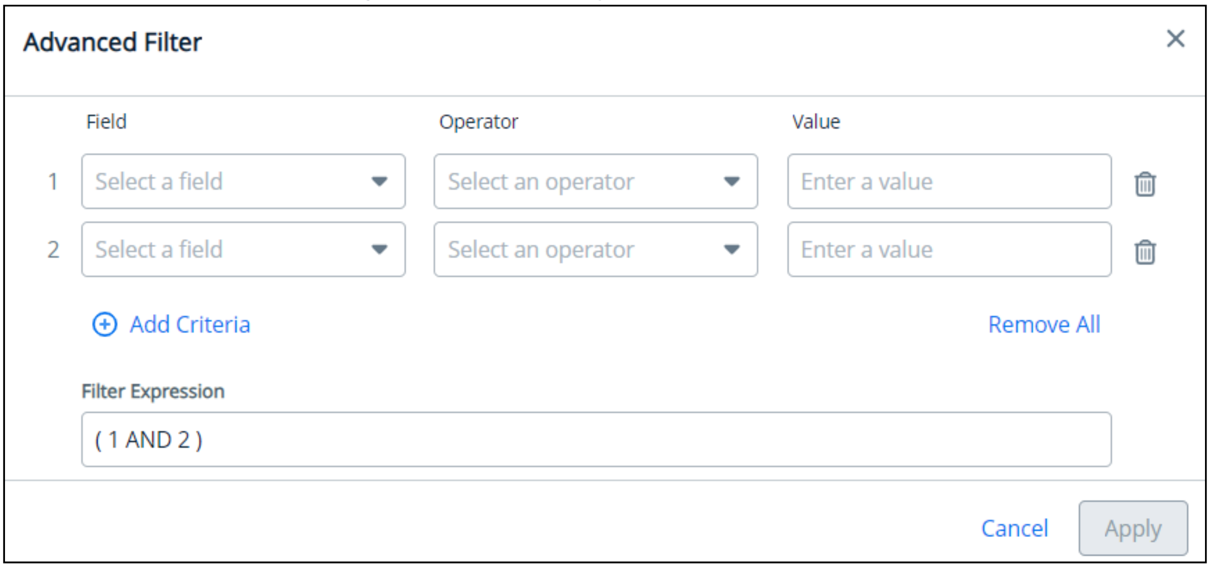
1. From the Default dropdown, click Create New View. The Save View dialogue box is displayed.


2. Enter the mandatory value in the Saved View Name field.
3. Enter an optional description.
4. **Click** the Private or Public radio buttons to categorize who can view this column list view.
5. Click **Save** to save the view else, click **Cancel** to close the dialogue box.

Creating Advanced Filter

You can achieve greater selectivity and granularity in the search results by creating an advanced filter.

To Create an Advanced Filter

1. Click the Advanced Filter icon ( ).
   The Advanced Filter dialogue box is displayed.
   

2. Select the Field, Operator, and Value for the filter criteria. Click Add Criteria to add more search criteria.
   The Filter Expression combines both the filter criteria using an AND operator.
3. Click the **Delete** icon ( ) to remove the filter criteria. To remove all the filter criteria, Click Remove All.
4. Click **Apply** to apply the filter or **Cancel** to close the dialogue box.

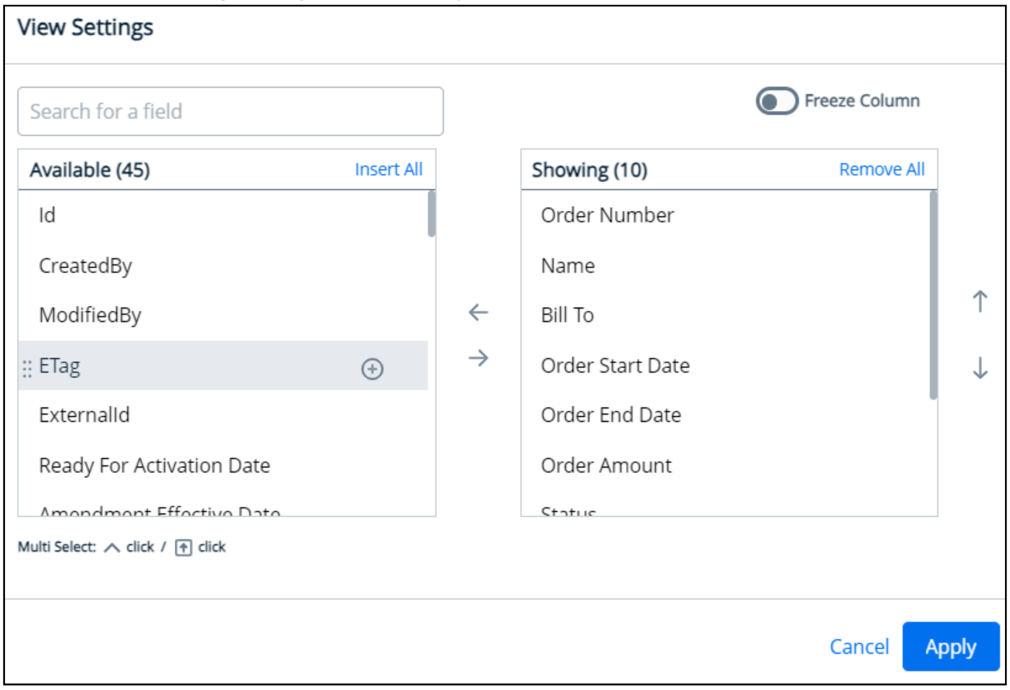
Changing the View Settings

You can use the view settings dialogue box to customize the number of columns on the user interface. You can add fields from the Available list to the Showing list. You can also remove fields from the Showing list.

To Change the View Settings

1. Click the View Settings icon ( ).

2. The View Settings page is displayed.



3. Click any field in the Available list.
4. Click the add icon ( ) or the right arrow ( ) to add the field to the Showing list. Click **Insert All** to add all the available fields to the Showing list.
5. Click any field in the Showing list.
6. Click the minus icon ( ) or the left arrow ( ) to remove the field from the Showing list.
   Click Remove All to remove all the fields from the Showing list.
7. Click the up ( ) or down ( ) arrows to rearrange the fields in the Showing list. The order of the fields in the Showing list is displayed as a column view on the user interface.
8. Click **Apply** to save the changes or **Cancel** to close the dialogue box.
9. Slide the Freeze Column slider to freeze the first column (first field in the showing list) on the user interface.

Exporting Files

You can export the order records from the user interface.

To Export Files

1. Select the checkbox beside the Oder Number column. You can select one, multiple, or all the records in the list.

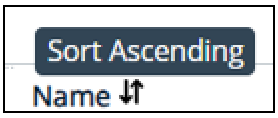
   The export icon ( ) is activated.
2. Click the export icon ( ).
3. Choose the desired file format (CSV or Excel) for the export.
4. Enter the file name and click **Save**.

Sorting Search Results and Lists

You can sort both, full lists and search results by column in ascending or descending order.

To sort search results and lists

1. Adjacent to each column heading is a list order selector ( ). Hover over the list selector to see in which direction (ascending or descending) a sort will present results:

2. Select a column and click its list order selector to sort all results (complete list or search results) by the selected column values.

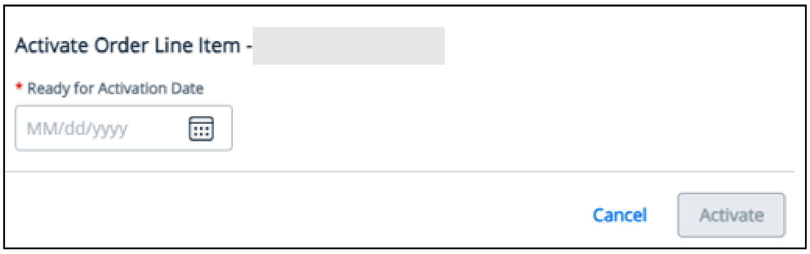
Activating an Order

You can activate an order in Draft status by using the Activate button on the Order Details page. After activation, the Order and related order line items are marked as Activated, and the ready-for-activation date is populated on the order and order line item records.

You can also activate individual order line items (OLIs) under an order. Upon activation, the OLI status is updated to Activated, while the order may still be in Draft status. The order moves to Activated status when all the OLIs under it are activated.

> The Activate button remains hidden if the order or order line item has already been activated.

To activate an order line item

1. Navigate to the order line item's Details page.
2. Click the **Activate** button.
   The Activate Order Line Item pop-up opens asking the ready for activating date.
   

3. Enter the Ready for Activation Date.
   The Activate button is highlighted.
4. Click **Activate** to activate the order line item or **Cancel** to close the pop-up.

To activate an order

1. Navigate to the Order Details page.
2. Click the **Activate** button.
   The Activate Order pop-up opens asking the ready for activating date.
   

3. Enter the Ready for Activation Date.
4. Click **Activate** to activate the order or **Cancel** to close the pop-up.
   On activation, the Order and related order line items are marked as Activated, and the ready-for-activation date is populated on the order and order line item records.

Order Details Page

The Order Details page lists the transaction details of a single order. Click a specific order on the User Interface to open the details about that order. It displays:

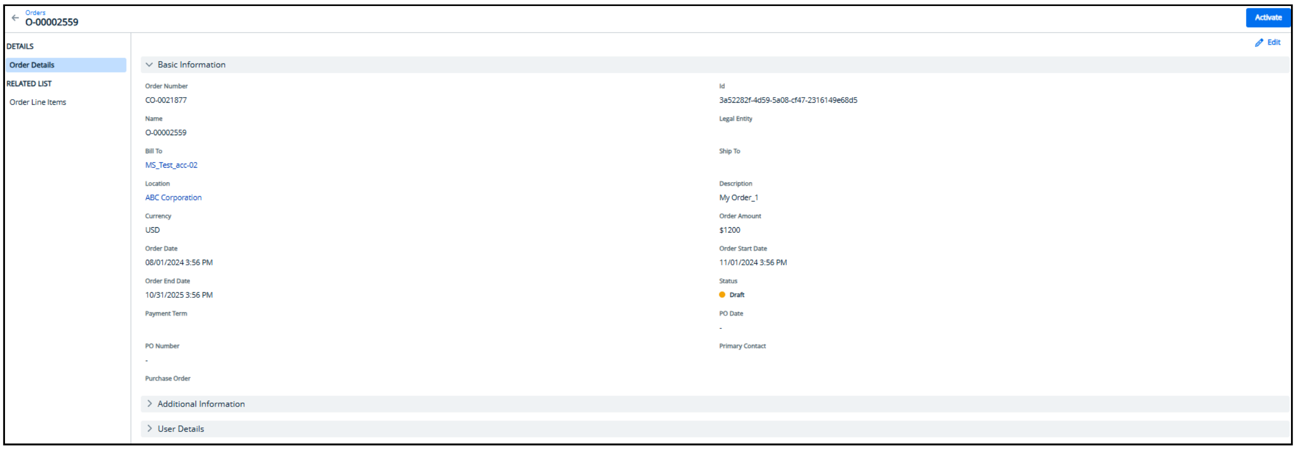
- Name of the order on the top.

- Activate button.
- Edit button.

> The Activate and Edit buttons remain hidden if the order has already been activated.

- Details and Related Lists in the left side pane.
- Basic Information, Additional Information, and User Details in the right side pane.

The following diagram illustrates the order details page of a single order.



You can perform the following actions from this page:

- Navigate to the Order Line Items page by clicking Order Line Items in the left pane under the Related List.
- Activate the order that is in Draft status.
- Edit the order details.

Editing Order Details

You can edit an order that is not in Activated status. Not all fields on the order details can be edited. It depends on the source of the order as follows:

- If the source of the order is Account, all the fields are editable.
- If the source of the order is Quote, the following fields are editable:
  - Description
  - Order Date
  - Parent Order
  - Payment Status
  - PO Date
  - PO Number
  - Primary Contact

- Purchase Order
- Status
- Type
- Version Number

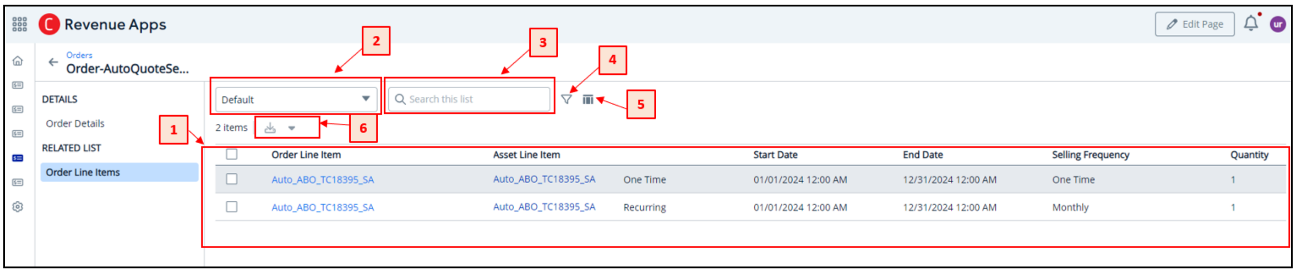
To edit order details

1. Click the **Edit** button.
2. Edit the fields on the page.
3. Click **Save** to save the changes or **Cancel** to return to the Order Details page.

Order Line Items Page

The Order Line Items page displays a list of all the order line items under a given order.

Click the Order Line Items under the Related List in the left navigation pane to open the Order Line Items page. It enables you to access the order line items and perform activities like Searching, Filtering, View Settings, and exporting files.



<table>
<tr><th>Number</th><th>Description</th></tr>
<tr><td>1</td><td>A list of order line items with default column view. You can see the following columns as default view settings:
Order Line Item
Asset Line Item
Price Type
Start Date
End Date
Selling Frequency
Quantity
Net Unit Price
Net Price
Status</td></tr>
</table>

Number	Description
2	Default and personalized column list view.
3	Basic Search to retrieve required orders using order number or order name as search parameters. • To search an order number, enter the exact order number in the search box. • To search an order name enter the search term in the search box.
4	Advanced filter to achieve greater selectivity and granularity in the basic search results.
5	View settings to change the default column view.
6	Export icon to export the file in CSV or Excel format.

From this page, you can:

- Create a personalized column list view.
- Create an advanced filter.
- Change the default view settings.
- Export the files.

From this page, you can navigate to the order line item details by clicking any order line item from the list or navigate to the order details page by clicking Order Details.

Order Line Item Details Page

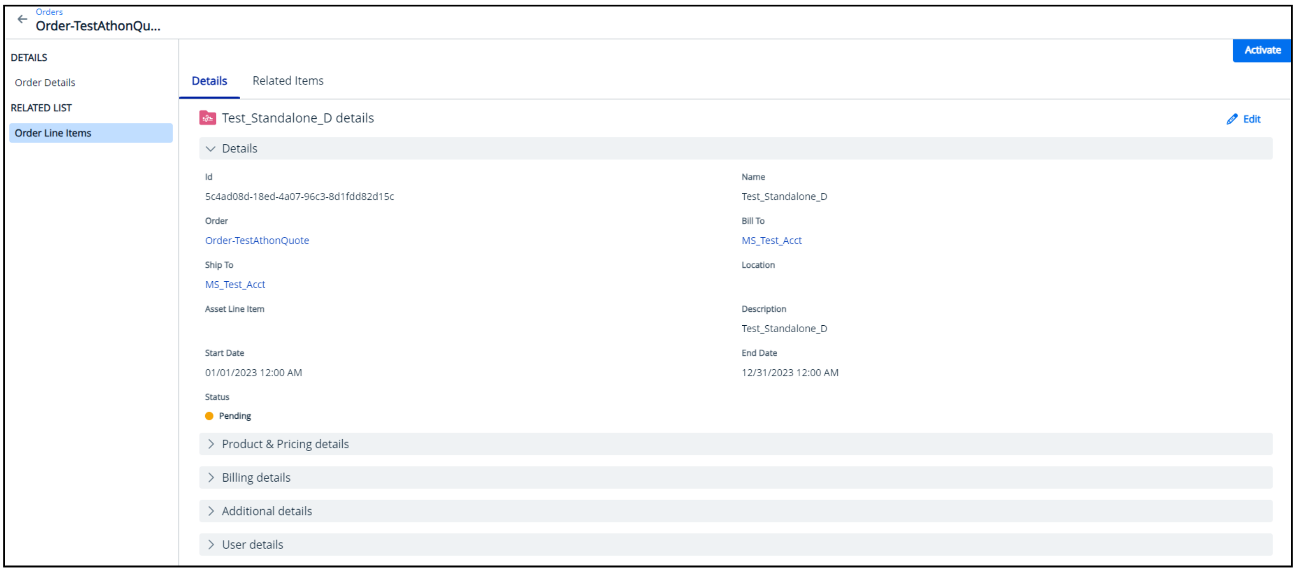
You can open the Order Line Items (OLI) details page by clicking the order line item under an order. It lists the transaction details of a single order line item. It displays:

- Name of the order on the top.
- Back and Activate buttons.

> The Activate button remains hidden if the order line item is already activated.

- Details and Related Lists in the left side pane.
- Name of the order line item, Basic Information, Additional Information, Billing Details, and User Details in the right side pane under the Details tab.

The following diagram illustrates the order line item details page:



You can perform the following actions from this page:

- Activate the order line item.
- Navigate to the Order Details page by clicking Order Details.
- Edit an order line item.

To activate an order line item

1. Click the **Activate** button.
   The Activate Order Line Item pop-up opens asking the ready for activating date.
   

2. Enter the Ready for Activation Date.
3. Click **Activate** to activate the order line item or **Cancel** to close the pop-up.

Editing an Order Line Item

You can edit an order line item if its parent order is not in Activated status. Not all fields on the OLI can be edited. It depends on the Source of the order as follows:

- If the source of the order is Account, all the OLI fields are editable.
- If the source of the order is Quote, the following fields are editable:

- Description
- Purchase Order
- Purchase Order Item
- Status
- Version Number

To edit an order line item

1. Click the **Edit** button.
   The order name banner changes to Edit Order Line Item-order name.
2. Edit the field details on the page.
3. Click **Save** to save the changes or **Cancel** to return to the Order Line Items Details page.

Order Management Feature by Release

Review the latest Order Management Features by Release document.

- Features by Release

Features by Release

This document contains an overview of features introduced in each major release of Conga Order Management. For more information, see Order Management Features by Release.

Conga Customer Community & Learning Center Resources

Transform your business and drive success with your one-stop shop, resource-rich Conga Customer Community.

After registering as a new member, you can explore a variety of resources, including exclusive access to our product user groups, where you can ask questions, collaborate with peers, and learn best practices.

From a personalized onboarding checklist to free expert-led webinars and our thought-leadership blog, the community is not only a gateway to your success, but a way to manage your Conga account, access the install center, and submit support tickets.

Don't forget to check out the Conga Learning Center to review your limited catalog of getting started courses. Want more? Consider upgrading to the Conga Learning Pass to unlock our premium training subscription.

Ready to get started?

Log into the Conga Customer Community with your credentials. Not yet registered? No problem. Set up an account to receive your credentials via our registration page.

After you log in, explore everything the community has to offer by clicking the "Get started" tab in the top navigation menu.

If you're ready to jump right into training, there are two ways to access the Conga Learning Center:

- On the home page, click the "Learning center" tile
- In the top navigation, click the "Learn" tab and then click "Learning center" on the dropdown menu