



# Conga Partner Commerce

202409.1.0 Preview Release

Get early access to the latest features and improvements.



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


# Partner Commerce Release Notes

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

- [202409.1.0 Release Notes](#)

## 202409.1.0 Release Notes

In these release notes, you can find new features and enhancements and fixed and known issues for the Partner Commerce 202409.1.0 release. For documentation updates, see [What's New in Partner 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 Partner Commerce in this release.

## Replacement Constraint Rules for Product Family & Product Group

You can now apply replacement constraint rules based on product family and product group. These rules display prompts or messages in the UI based on product selection and support multiple product conditions, while ensuring Auto-inclusion of a product prevents its removal but allows automatic replacement of other products.

For more information, see [Working with Replacement Rules](#).

## Fixed Issues

There are no fixed issues in this release.

## Known Issues

There are no known issues in this release.

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## About Conga Partner Commerce

Present and place orders through a single digital commerce platform, providing a unified and modern buying and selling experience. Partner Commerce is the activity of electronically buying or selling products on online services or over the Internet. Partner 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 Conga Platform. With an API-first approach, CPQ services (configuration, pricing, quoting) can be embedded into customer's eCommerce, Direct Sales, and Partner Portals. Conga CPQ helps customers to streamline configuration and pricing across revenue lifecycle operations, providing faster scale and performance.

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

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 Partner 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 Partner 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 in 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 Partner Commerce Documentation

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

## 202409.1.0

Document	Publication Date	Topic	Description
202409.1.0		<a href="#">Working with Replacement Rules</a>	Added supported product types as Product Family and Product Group in the Replacement Rule topic.
		<a href="#">SDK Reference</a>	Updated for 202409.1.0 release.
		<a href="#">Installing Reference Template</a>	Updated the SDK packages and reference templates information.

## 202408.3.0

Document	Publication Date	Topic	Description
202408.3.0		<a href="#">Working with Replacement Rules</a>	Added supported product types as Bundle and Options in the Replacement Rule topic.
		<a href="#">SDK Reference</a>	Updated for 202408.3.0 release.
		<a href="#">Installing Reference Template</a>	Updated the SDK packages and reference templates information.

## 202408.2.0

Docu ment	Publicatio n 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
		Updating Existing Favorite	New topic
		Working with Favorites	New topic created with the updated favorites information.
		SDK Reference	Updated for 202408.2.0 release.
		Installing Reference Template	Updated the SDK packages and reference templates information.

**202408.1.0**

Docu ment	Publicatio n Date	Topic	Description
202408.1.0		Product Configuration	Added Replacement Rule information in the topic.



Docu ment	Publicatio n Date	Topic	Description
		<a href="#">SDK Reference</a>	Updated for 202408.1.0 release
		<a href="#">Installing Reference Template</a>	Updated the SDK packages and reference templates information.

**202407.2.0**

Docu ment	Publicatio n Date	Topic	Description
20240 7.2.0		<a href="#">Using CTA (call-to-action) "Quick-Add" button</a>	Updated the topic with Quick-Add button icon and related screens.
		<a href="#">Browsing Catalog</a>	Updated the topic with Quick-Add button icon and related screens.
		<a href="#">Searching for Products</a>	Updated the topic with Quick-Add button icon and related screens.
		<a href="#">Comparing Products</a>	Updated the topic with Quick-Add button icon and related screens.
		<a href="#">Adding Products to a Cart</a>	Updated the topic with Quick-Add button icon and related screens.
		<a href="#">Product Configuration</a>	Updated the topic with Quick-Add button icon and related screens.

Docu ment	Publicatio n Date	Topic	Description
		<a href="#">Revalidatin g the Product Configurati on</a>	Updated the topic with Quick-Add button icon and related screens.
		<a href="#">Managing the Cart</a>	Updated the topic with Quick-Add button icon and related screens.
		<a href="#">Cloning Primary Line Items</a>	Updated the topic with Quick-Add button icon and related screens.
		<a href="#">Managing Favorites</a>	Updated the topic with Quick-Add button icon and related screens.
		<a href="#">Managing Quote</a>	Updated the topic with Quick-Add button icon and related screens.
		<a href="#">Managing Assets</a>	Updated the topic with Quick-Add button icon and related screens.
		<a href="#">SDK Reference</a>	Updated for 202407.2.0 release.
		<a href="#">Installing the Reference Template</a>	Added the important note for GitHub release registries to get the latest SDK packages and reference templates.

**202407.1.0**

Docu ment	Publicatio n Date	Topic	Description
20240 7.1.0	NA	NA	NA

**202406.2.0**


Docu ment	Publicatio n Date	Topic	Description
202406.2.0	📅 25 Jul 2024	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.
		SDK Reference	Updated for 202406.2.0 release.

**202406.1.0**


Docu ment	Publicatio n 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.

Docu ment	Publicatio n Date	Topic	Description
		<a href="#">Adding Products to a Cart</a>	Updated the topic with information about Check Status and Abandon Cart.
		<a href="#">Comparing Products</a>	Updated the topic with information about Compare and Select All for mobile view.


**202405.2.0**

Docu ment	Publicatio n Date	Topic	Description
202405.2.0	 14 Jun 2024	<a href="#">SDK Reference</a>	Updated for 202405.2.0 release


**202405.1.0**

Docu ment	Publicatio n Date	Topic	Description
202405.1.0	 07 Jun 2024	<a href="#">Managing Assets</a>	Updated topic with information about buy more assets.
		<a href="#">SDK Reference</a>	Updated for 202405.1.0 release

**202404.2.0**

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


**202404.1.0**

Document	Publication Date	Topic	Description
202404.1.0	 10 May 2024	<a href="#">Managing Assets</a>	Updated topic with information about Terminate and Buy More actions.
		<a href="#">SDK Reference</a>	Updated for 202404.1.0 release


**202403.3.0**

Docum ent	Publication Date	Topic	Description
202403.3.0	 18 Apr 2024	<a href="#">Managing Assets</a>	Updated topic with information about Amend action.
		<a href="#">SDK Reference</a>	Updated for 202403.3.0 release


**202403.2.0**

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

**202403.1.0**

Document	Publication Date	Topic	Description
202403.1.0	 07 Mar 2024	<a href="#">SDK Reference</a>	Updated for 202403.1.0 release

**202402.2.1**

Document	Publication Date	Topic	Description
202402.2.1	 07 Mar 2024	<a href="#">Viewing the Product Details</a>	Updated topic with information about recommended product feature enhancement.
		<a href="#">Working with the Cart</a>	
		<a href="#">Managing the Cart</a>	Updated topic with information about contract pricing.
		<a href="#">Working with the Cart</a>	
		<a href="#">SDK Reference</a>	Updated for 202402.2.1 release

**February '24**

Document	Publication Date	Topic	Description
February '24	 14 Feb 2024	<a href="#">Browsing Catalog</a>	Updated topic with information about adding multiple products to the cart, and retry pricing.
		<a href="#">Adding Products to a Cart</a>	Updated topic with information about adding multiple products to the cart, preventing users from adding products without configuring first, and retrying pricing.
		<a href="#">Setting Up Master Data</a>	Updated topic with information about how to set a flag preventing users from adding products without configuring first.
		<a href="#">Deleting Primary Line Items</a>	Updated topic with information about deleting multiple products from the cart.
		<a href="#">Cloning Primary Line Items</a>	Updated topic with information about cloning primary line items.

Document	Publication Date	Topic	Description
		<a href="#">Managing the Cart</a>	Updated topic with information about cloning a cart and deleting multiple carts.
		<a href="#">Working with the Cart</a>	Updated topic with information about cloning a cart and searching line items.
		<a href="#">Managing Quotes</a>	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.
		<a href="#">Managing Orders</a>	Updated topic with information about generating a quote document, and viewing order summary charts.
		<a href="#">Creating Flow and View for the Cart Details Page</a>	New topics
		<a href="#">Configuring Cart Line Item Fields</a>	
		<a href="#">Applying Promotions</a>	New topic
		<a href="#">Managing Assets</a>	New topic
		<a href="#">Configuring Data Sync</a>	New topic
		<a href="#">SDK Reference</a>	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
		Working With Home Page	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: <ul style="list-style-type: none"> <li>• Display Option(s) as a Picklist</li> <li>• Hide Option Groups and Option</li> <li>• Modify Option Groups and Options within a Bundle Configuration</li> <li>• Set Required Option(s)</li> <li>• Exclude Option Product within a Bundle Configuration</li> </ul>
		<a href="#">Working with the Cart</a>	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	Browsing Catalog	Updated topic with information about <i>Based on Pricelist</i> support.
		Viewing the Product Details	Updated topic with information about <i>Product Attribute Rules, Constraint Rules, Option Configuration</i> support, and Confirmation action (prompt message) for unsaved changes.

Document	Publication Date	Topic	Description
		Adding Products to a Cart	Updated topic with the information about In-line validation and configuration message for inclusion, exclusion, and configuration rule.
		Product Configuration	Updated topic with information about <i>Product Attribute Rules, Constraint Rules, and Option Configuration</i> .
		Attribute Based Configuration Rules	New topic
		Managing the Cart	Updated topic with the information about the <i>Set Effective Date</i> option for the cart operation, and <i>Contract Pricing</i> support.
		Working with the Cart	Updated topic with the information about the <i>View Details</i> option to see cart-level detailed breakup.
		Cloning Primary Line Items	New topic
		Managing Orders	Updated topic with the information about edit <i>line items</i> for non-confirmed orders.
		Using CTA (call-to-action) "Quick-Add" button	New topic

**February '23**

Document	Publication Date	Topic	Description
February '23	 08 Feb 2023	All topics	New documentation added in this release.

# Partner Commerce for Administrators

This section covers information on how Partner Commerce works. This section also provides step-by-step instructions on how to install, implement and deploy Partner 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 Partner Commerce.
Primary Audience	Admin users are responsible for installing, implementing, and deploying the Partner Commerce solution.
Updates	For a comprehensive list of updates for each release, see <a href="#">What's New in Partner Commerce Documentation</a> .
Other Resources	<ul style="list-style-type: none"> <li>• See <a href="#">Partner Commerce for Users</a> for basic admin tasks and end-user experience.</li> <li>• See <a href="#">Partner Commerce SDK</a> for technical instructions on the installation and setup of a Partner Commerce storefront.</li> <li>• See <a href="#">Partner Commerce for REST API Developers</a> for details of the CPQ REST APIs consumed by Partner Commerce.</li> </ul>

Select one of the following topics for more information:

- [Getting Started with Partner Commerce](#)
- [System Requirements](#)
- [Creating a Storefront Record](#)
- [Downloading Partner 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 Partner Commerce

As an administrator, you must complete steps 1 through 4 in order to set up the initial configuration for the Partner Commerce application. The implementor can then proceed

with steps 5 to 11 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. [Download the SDK](#)
6. [Clone the Reference Template](#)
7. [Install the Reference Template](#)
8. [Configure the Template](#)
9. [Set up the Master Data](#)
10. [Configure Data Sync](#)
11. [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.

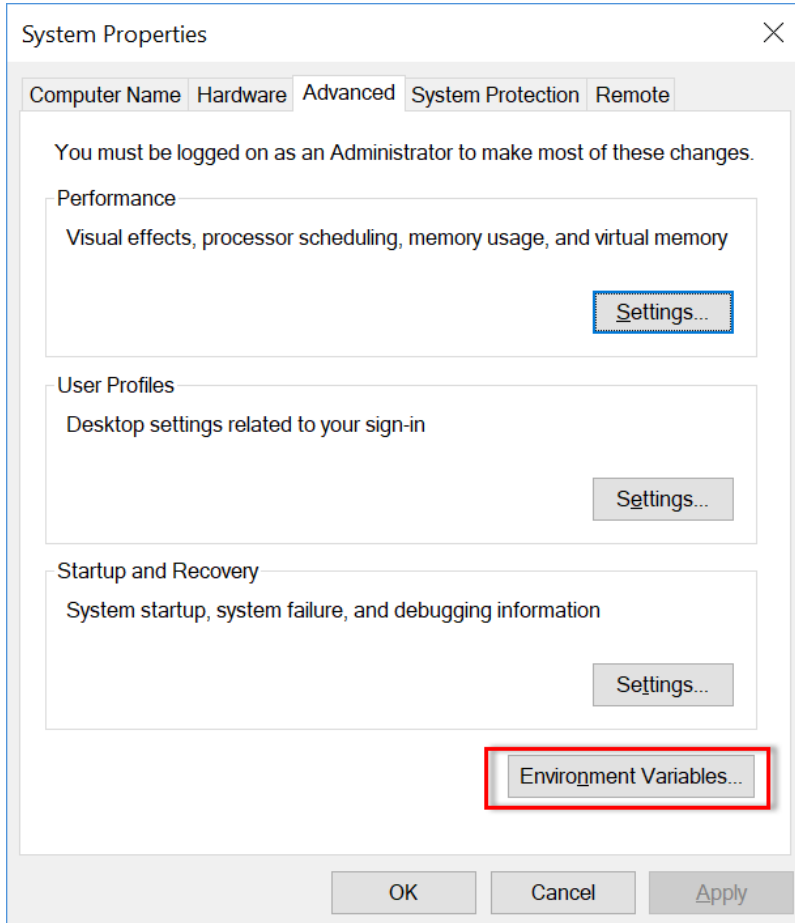
- Node JS v16.18.1 or higher: Install Node JS from the official [Node website](#). For windows, download Windows installer .msi 64-bit.
- Angular CLI until version 13.0.0:
  - To check if already installed, use the command: `ng -v`
  - If not installed, use the command: `npm install -g @angular/cli`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

## Environment Variables

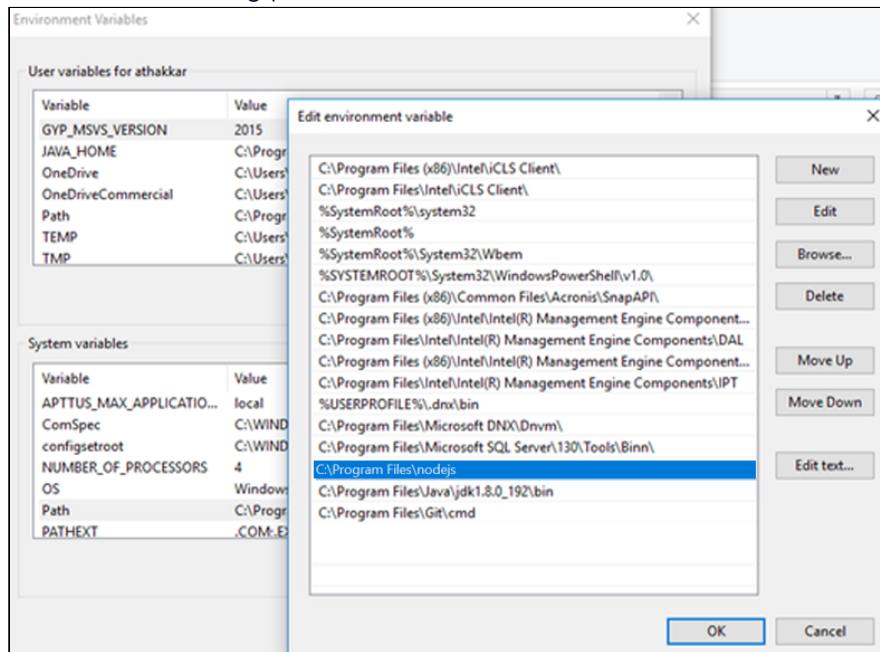
When *NodeJs* is installed, it is necessary that they are accessible globally using the command prompt. Sometimes the environment variables are not configured and you may see errors stating 'node' is not recognized as an internal or external command. You must configure the environment variables on your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

**i** 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](https://<URL_of_the_Instance>/api/data/v1/Account) API to create an account. Use the following sample payload to create an account:

**i** 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](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.](#)

## Downloading Partner 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:
  - `@congarvenuecloud/core`
  - `@congarvenuecloud/ecommerce`
  - `@congarvenuecloud/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.

```
20  "@angular/forms": "~13.0.0",
21  "@angular/platform-browser": "~13.0.0",
22  "@angular/platform-browser-dynamic": "~13.0.0",
23  "@angular/router": "~13.0.0",
24  "@azure/msal-angular": "^2.1.2",
25  "@azure/msal-browser": "^2.22.1",
26  "@congarvenuecloud/core": "^2023.2.19",
27  "@congarvenuecloud/ecommerce": "^2023.2.19",
28  "@congarvenuecloud/elements": "^2023.2.19",
29  "@fortawesome/fontawesome-free": "^5.12.0",
30  "@ng-select/ng-option-highlight": "0.0.5",
```

- After the SDK libraries are built, they are published to the GitHub release registries here:
  - For partner commerce template: <https://github.com/congarvenuecloud/partner-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  @congarvenuecloud: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 Reference Templates](#)
- [Installing Reference Template](#)

- [Configuring Templates](#)
- [Configuring Cart Pricing Status Retry Settings](#)
- [Running Application in Localhost](#)

## Cloning Reference Templates

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

 Partner commerce template: <https://github.com/congarevenuecloud/partner-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:



```
Administrator: Command Prompt
Microsoft Windows [Version 10.0.19044.2364]
(c) Microsoft Corporation. All rights reserved.

C:\WINDOWS\system32>cd..

C:\Windows>cd..

C:\>git clone https://github.com/congarevenuecloud/partner-commerce.git
```

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

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

## Installing Reference Template

### Important

To access the new features and enhancements delivered in the 202409.1.0 release, use the latest SDK packages and reference templates from the GitHub release registries:

- <https://github.com/congarevenuecloud/partner-commerce/releases>: Search and select the 202409.1.0 release.
- <https://github.com/orgs/congarevenuecloud/packages>: Use the 202409.1.7 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=`

```
1 @congarvenuecloud:registry=https://npm.pkg.github.com/  
2 //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 `congarvenuecloud/partner-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. Do not modify anything in the `node_modules` folder. This folder stores all third-party dependencies. Whenever you run an npm command, the dependencies in this folder are overwritten.

## Configuration Parameters

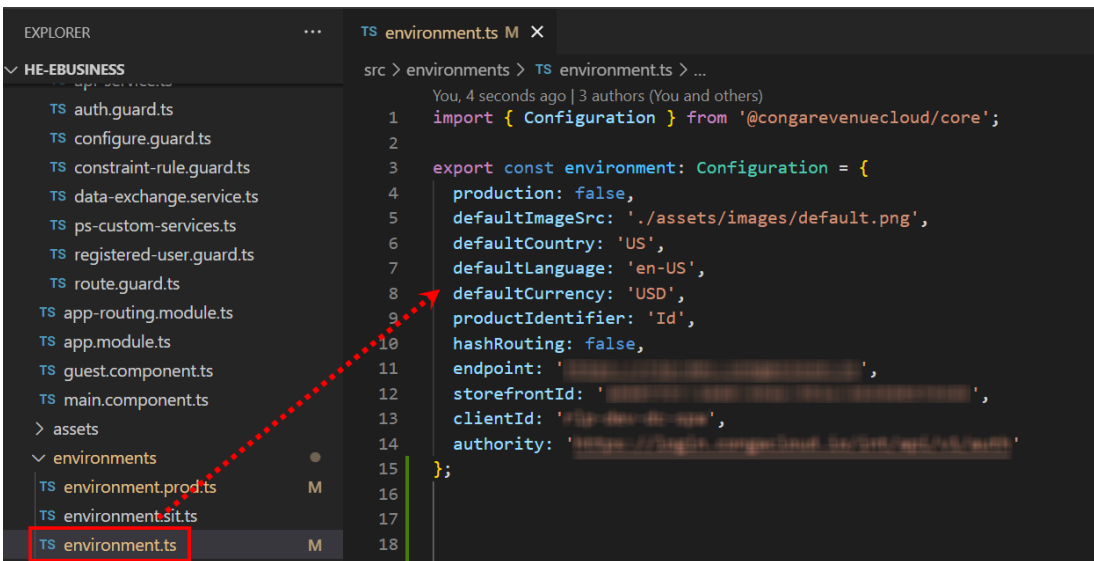
During the npm install phase, a configuration file named `environment.ts` is automatically created. This is a runtime configuration for the application. The `environment.ts` file contains runtime specific variables that help the application to operate. You must set it up with the following parameters:

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".
productId	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.
hashRouting	Boolean	No	False	To support the hash URL path, set it to true.

Name	Type	Required	Default Value	Description
endpoint	String	Yes	-	Specify the Conga Platform instance where your tenant is onboarded. For example: <code>https://test.congacloud.com</code>
authenticationEndpoint	String			
cartRetry Limit	number	No	5	Specify the number of retry attempts for fetching the active cart's status until pricing completes.  <div style="border: 1px solid #f9c77d; padding: 10px; margin-top: 10px;"> <p> The application first considers the PricingCircuitMaxRetries value for fetching the active cart's status. For more information, see <a href="#">Configuring Cart Pricing Status Retry Settings</a>.</p> </div>
cartRetry Delay	number	No	500	Specify the delay in milliseconds between each retry attempt until pricing completes.  <div style="border: 1px solid #f9c77d; padding: 10px; margin-top: 10px;"> <p> The application first considers the PricingCircuitDelay value for delay in milliseconds between each retry attempt. For more information, see <a href="#">Configuring Cart Pricing Status Retry Settings</a>.</p> </div>
captchaSiteKey?	String	No	-	reCAPTCHA keys represent how reCAPTCHA Enterprise is configured for a website. For more information on how to create keys, see <a href="#">Create reCAPTCHA keys</a> .

Name	Type	Required	Default Value	Description
translationModule	String	No	Null	<p>Specify the translation module name.</p> <ul style="list-style-type: none"> <li>If you do not pass the module name, the application by default considers the local translation file.</li> <li>If you want to use the translation defined at the Conga Platform level, then pass the module name created on the Conga Platform.</li> </ul> <p>For more information on how to create module and translation and about local translation files, see <a href="#">Setting Up Multi-Language Support</a>.</p> <div style="border: 1px solid #f9c97d; padding: 10px; margin-top: 10px;"> <p> 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.</p> </div>
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
assetActionLabels	String	No	-	<p>Set a custom label name (key and value pair) for the asset action(s).</p> <p>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.</p> <pre>assetActionLabels: {   'Renew': 'Custom_Renew',   'Amend': 'Custom_Amend' }</pre> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p><b>⚠</b> Ensure that the <code>configuration.model.ts</code> file has <code>assetActionLabels?: Object</code> entry to use the custom label for the asset feature.</p> </div> <p>For more information on Asset-based ordering (ABO), see <a href="#">Managing Assets</a>.</p>

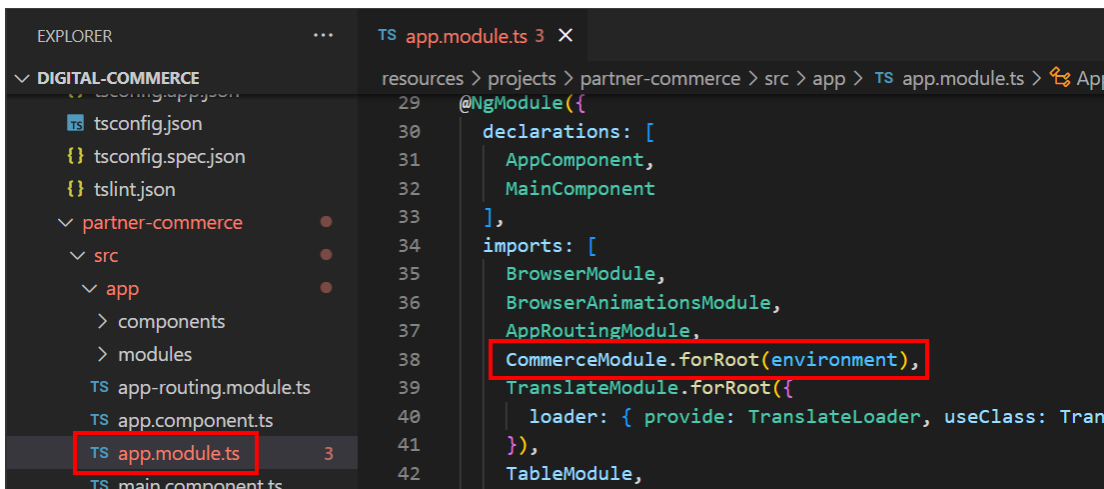




## Importing the app module into the root module

**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.



```

EXPLORER
  DIGITAL-COMMERCE
    tsconfig.json
    tsconfig.spec.json
    tslint.json
    partner-commerce
      src
        app
          components
          modules
          TS app-routing.module.ts
          TS app.component.ts
          TS app.module.ts
          TS main.component.ts

resources > projects > partner-commerce > src > app > TS app.module.ts
29 @NgModule({
30   declarations: [
31     AppComponent,
32     MainComponent
33   ],
34   imports: [
35     BrowserModule,
36     BrowserModuleAnimationsModule,
37     AppRoutingModule,
38     CommerceModule.forRoot(environment),
39     TranslateModule.forRoot({
40       loader: { provide: TranslateLoader, useClass: Tran
41     })),
42     TableModule,

```

## 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](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 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}](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.

```

1  {
2    "LocaleName": "es_ES"
3  }
```


 To list supported locales, use the following API:  
**GET** [https://<URL\\_of\\_the\\_Instance>/api/user-management/v1/locales](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.

### 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](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.

 You must update the translationModule parameter in the environment.ts file while configuring templates. For more information, see [Configuring Templates](#).

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}](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>"
}
```

The screenshot shows a side-by-side comparison of a user information form. On the left, the form is in Spanish, with labels like 'Nombre de pila', 'Apellido', 'Correo electrónico', 'Nombre de usuario', and 'Configuración regional del usuario'. On the right, the form is in English, with labels like 'FirstName', 'LastName', 'Email', 'UserName', and 'Locale'. A red double-headed arrow labeled 'Static Label Translation' connects the two versions of the form.

## 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}](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 Phone Number field label on the Account object into the Spanish language and locale (es\_ES):

1. Use the **POST** [https://<URL\\_of\\_the\\_Instance>/api/schema/v1/objects/{objectName}/translations/{locale}](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 list supported locales, use the following API:  
GET [https://<URL\\_of\\_the\\_Instance>/api/user-management/v1/locales](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 Email and Shipping Address field label on the Account object into the Italian language and Swiss locale (it\_CH):

1. Use the **POST** [https://<URL\\_of\\_the\\_Instance>/api/schema/v1/objects/{objectName}/translations/{locale}](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 list supported locales, use the following API:  
GET [https://<URL\\_of\\_the\\_Instance>/api/user-management/v1/locales](https://<URL_of_the_Instance>/api/user-management/v1/locales)

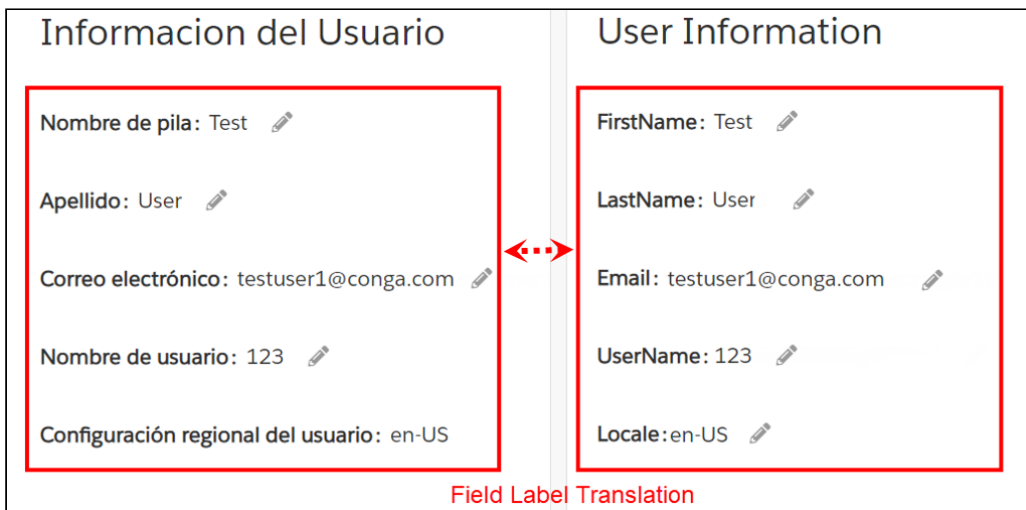
4. Use the following sample request body.

```
{
  "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

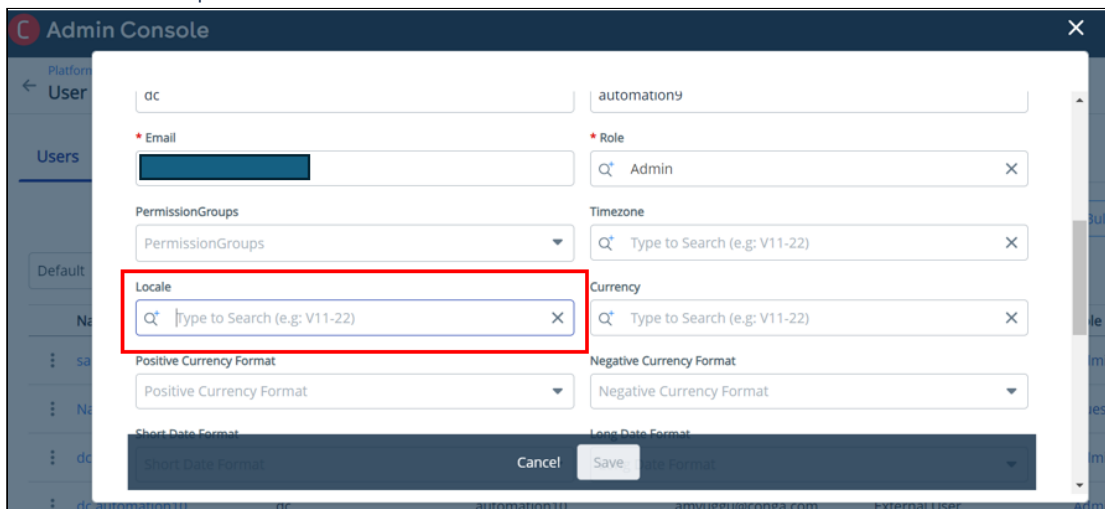
You can set the user-level locale via Admin User Interface using the "To edit a user" topic in the Conga Platform Admin Guide or the following "Update a user" API:

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

**i** 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.

```

1  {
2    "LocaleName": "zh-Hans-MO"
3  }
    
```


### Step 2. Add translation values

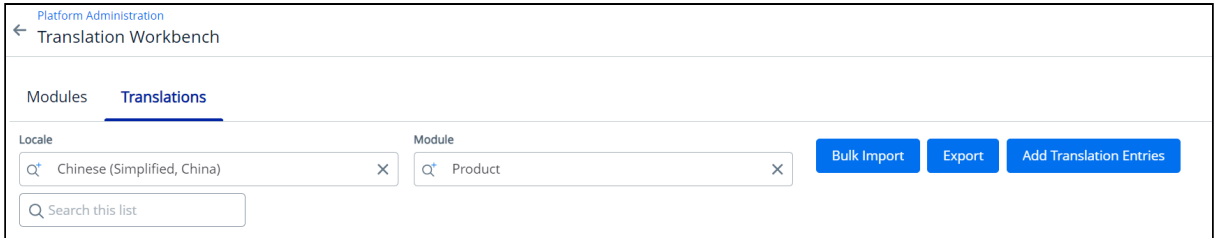
You can add the translation values via Admin User Interface for the module using the "[To add translation entries](#)" topic in the Conga Platform Admin Guide or the following "Add translation value" API:

POST `/api/localization/v1/translations/{locale}/{module}`

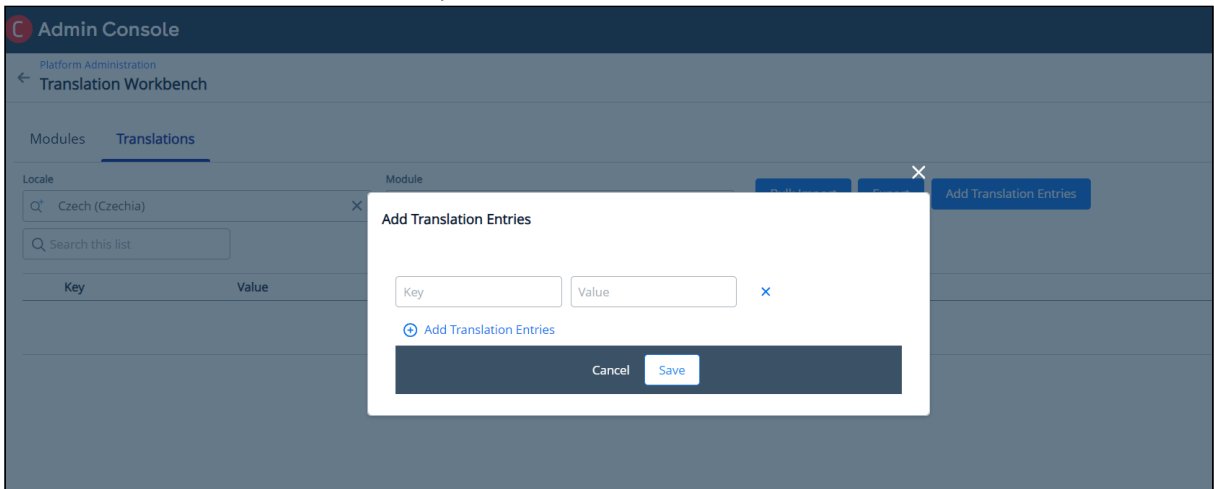
To add translation entries via Admin UI, follow the steps below:

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.

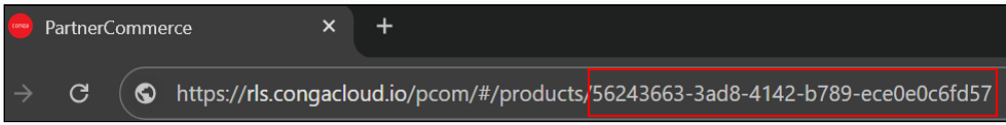


3. Search and select the desired **Locale** and **Module**.  
Add Translation Entries option enables.
4. Click **Add Translation Entries** option to add translation values.




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.

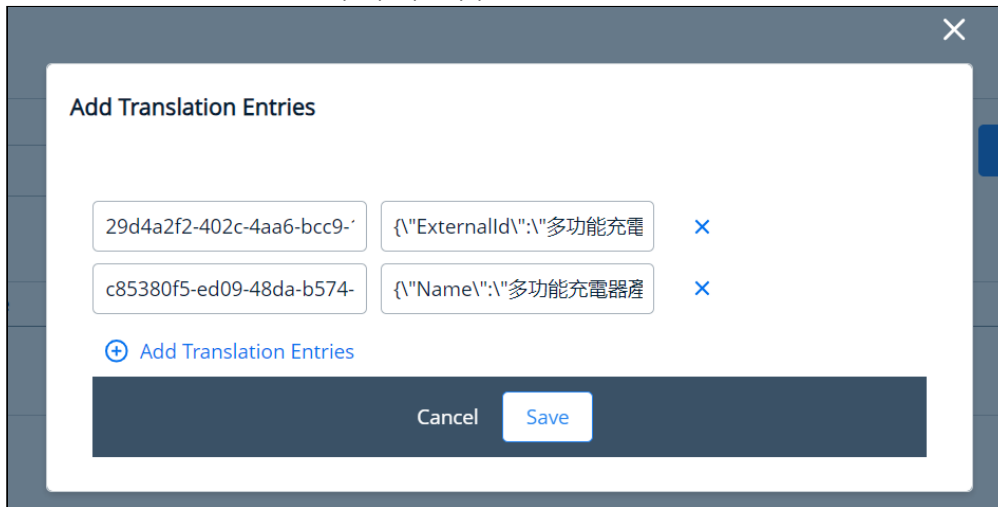
7. Click **Save**.

### 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.

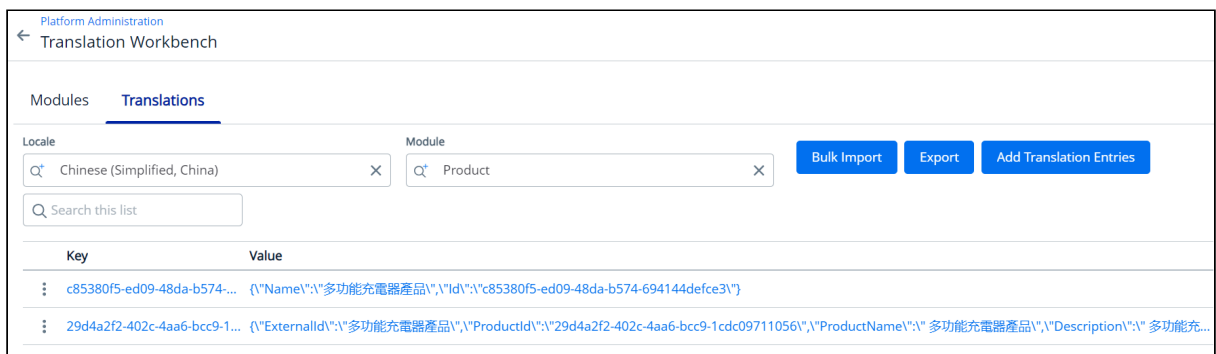


2. Enter the desired key and values for it.

**i** 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.



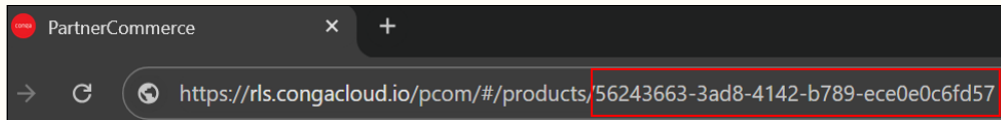
## API

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**

```

1  {
2    "Key": "29d4a2f2-402c-4aa6-bcc9-1cdc09711056",
3    "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\": \" 多功能電
   器產品\"}"
4  }
5
6  AttributeGroup
7  {
8    "Key": "c85380f5-ed09-48da-b574-694144defce3",
9    "Value": "{\"Name\":\"多功能充電器產品\", \"Id\": \"c85380f5-ed09-48da-
   b574-694144defce3\"}"
10 }
11
12 Attribute
13 {
14   "Key": "eee0fdb3-d290-43b3-a1b9-929152518dd2",
15   "Value": "{\"DisplayName\":\"多功能充電器產品\", \"Id\": \"eee0fdb3-
   d290-43b3-a1b9-929152518dd2\"}"

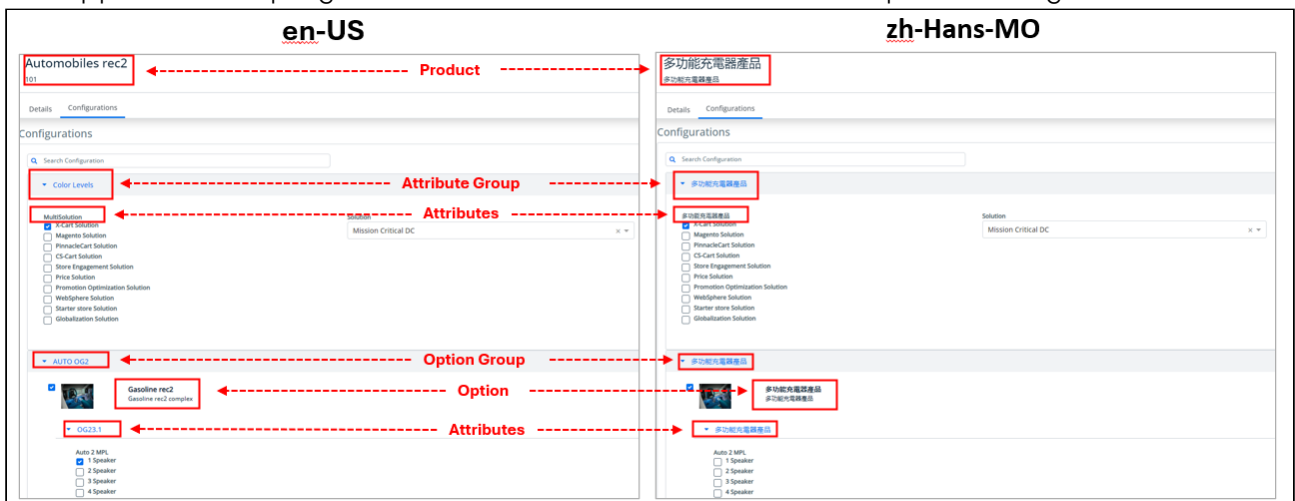
```

```

16 }
17
18 OptionGroup
19
20 {
21   "Key": "ff2238a8-1484-49ed-98c8-6437a9979b8e",
22   "Value": "{ \"Label\": \"多功能充電器產品\", \"Id\":
23     \"ff2238a8-1484-49ed-98c8-6437a9979b8e\" }"
24 }
25
26 category
27 {
28   "Key": "f5cd71c1-5b05-4a2d-b4db-0e7dc7e6fb24",
29   "Value": "{ \"Label\": \"硬體配置器\", \"Id\": \"f5cd71c1-5b05-4a2d-
30     b4db-0e7dc7e6fb24\" }"
31 }
32
33 api_error_message
34 {
35   "Key": "PRICELIST_IS_INVALID",
36   "Value": "多功能充電器產品"
37 }

```

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](#).

# Partner Commerce for Users

This section describes how Partner Commerce works and how partners can quickly select products and checkout on behalf of the end customer, all the time having a seamless 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 Partner Commerce.
Primary Audience	Partner users of an organization who want to place orders on behalf of end customers of the same organization.
Updates	For a comprehensive list of updates for each release, see <a href="#">What's New in Partner Commerce Documentation</a> .
Other Resources	<ul style="list-style-type: none"> <li>• See <a href="#">Partner Commerce for Administrators</a> for implementation and deployment procedures.</li> <li>• See <a href="#">Partner Commerce SDK</a> for technical instructions on the installation and setup of a Partner Commerce storefront.</li> <li>• See <a href="#">REST API Guide</a> for details of the CPQ REST APIs consumed by Partner Commerce.</li> </ul>

This section describes the following tasks:

- Selecting the Account for which the order is to be placed
- Browsing Catalog
- Managing Accounts
- Product Configuration
- Managing and checking out the cart
- Confirming the order

Select one of the following topics for more information:

- [Logging in to Partner Commerce](#)
- [Working With the Home Page](#)
- [Managing Accounts](#)
- [Browsing Catalog](#)
- [Managing the Cart](#)



- [Managing Favorites](#)
- [Managing Quotes](#)
- [Managing Orders](#)
- [Managing Assets](#)
- [Using CTA \(call-to-action\) "Quick-Add" button](#)

## Logging in to Partner Commerce

Every partner is provided with a unique Partner Commerce URL if your application is hosted on the Conga server or you already have a Partner Commerce URL if your application is hosted on your own server. You must log in to Partner Commerce to see the self-service portal.

### 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.

## To log in to Partner Commerce

1. Open the URL in your system's browser.  
It will redirect you to the Conga Platform login screen.

2. 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.
3. Click **Continue** or **Sign In** depending upon the Sign In method you have selected. You are redirected to the respective Identity Provider login screen.

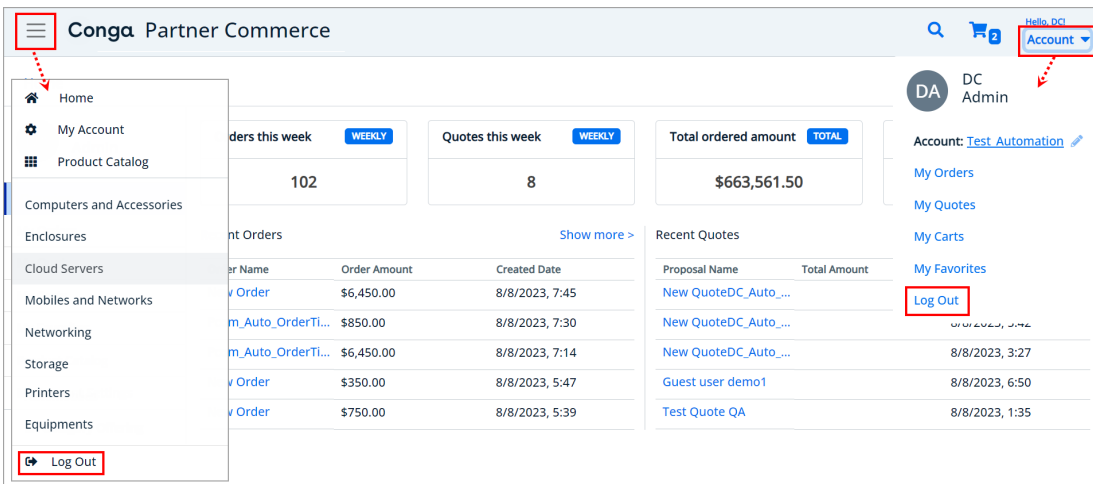
4. Enter your username and password and click **Log In**.  
If you forgot your password, follow the selected Identity Provider's process to reset your password.

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

## To log out from Partner Commerce

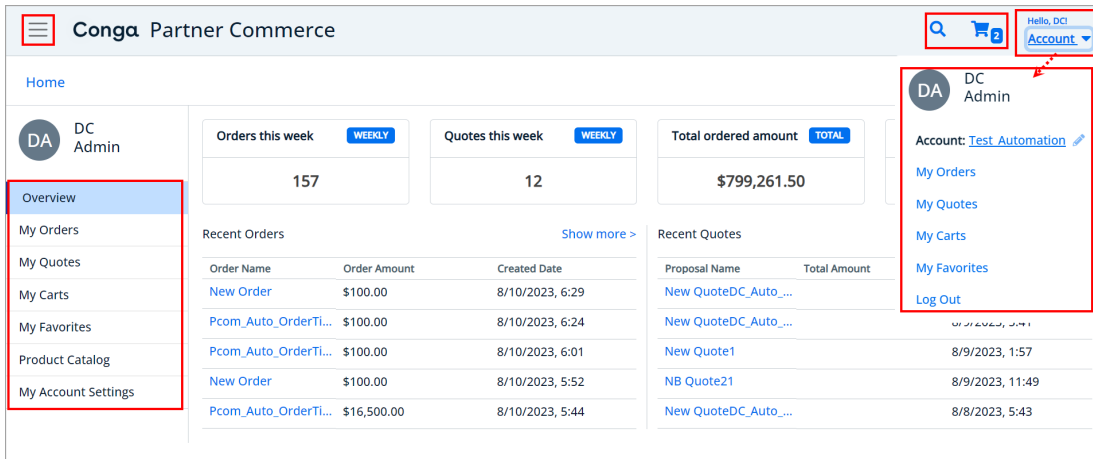
1. From the Partner Commerce home page, click the menu (☰) icon from the upper left corner of the page.  
--or--  
click the Account dropdown from the upper right corner of the page.
2. Click the **Log Out** option.

You will be redirected to the login screen.



## Working With the Home Page

After signing in to the Partner Commerce application, you are redirected to the home page, which contains all the following information of a user (Account) on your vendor's website. The header section on the top provides capabilities such as searching for the product, reviewing the main and mini cart, review and manage the account information by clicking the Account dropdown.



• **Overview**

- Weekly Orders Count
- Total Spending Amount
- Account Information
- Recent Orders placed in the current week
- Recent Quotes placed in the current week

• **My 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

• **My Quotes**

- Total Quote Count
- Total Quote Amount
- List of all the Quotes
  - Search for the particular quote
  - Set the number of quotes to be displayed per page

• **My Carts**


- Total Cart Count
- Create New Cart
- List of all the Cart
  - Search for the particular cart
  - Set the number of carts to be displayed per page
- Delete the selected Cart(s)
- Set the Active Cart


• **My 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
- [Product Catalog](#)
  - Product List
    - Product list view
    - Set the number of products to be displayed per page
    - Sort By - Relevance or Name
- [My Account Settings](#)
  - User Information
  - Account Information
  - Change Password

## Managing Accounts

After signing in to the Partner Commerce application, you are redirected to the **Home Page** > **Overview** section where you can view the details of the selected account. You can also access it by **a)** clicking the menu () icon in the upper left corner of the page and then selecting **My Account**, and **b)** clicking the **Account** dropdown at the upper right corner of the page.

 The following API with filter and other parameters is used to get the selected account's order and quote data.

**GET** `https://<URL_of_the_Instance>/api/order/v1/orders`


**GET** `https://<URL_of_the_Instance>/api/quote/v1/quotes`


## Change the Account to Work On Behalf Of

As a partner, you work with multiple customers and therefore multiple accounts. You can switch accounts using the Account dropdown available in the top navigation bar.

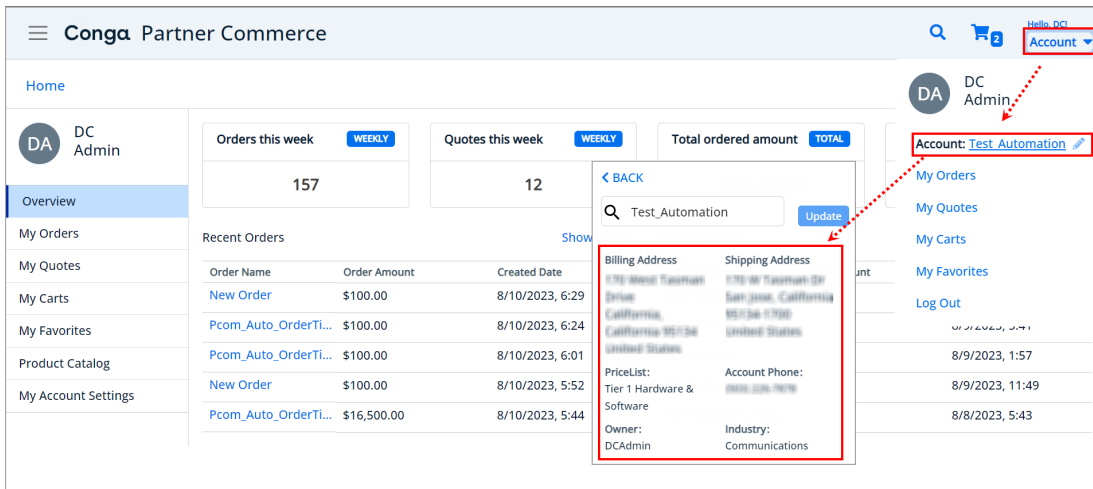
### To change the account


1. From the top navigation bar, click the **Account** dropdown. You can see the Account name and other links to directly access the My Orders, My Quotes, My Carts, and My Favorites sections.

2. Click the **Account** name or the **Edit** (  ) icon. You can review the details of the currently selected account.
3. Search and select the account to work on behalf of. You can also review the information for the selected account.

 To return to the previous screen, click **Back**.

4. Click **Update**.



 The following API is used to fetch the account. For more information, click [here](#).

**GET** `https://<URL_of_the_Instance>/api/data/v1/objects/Account`


## Update the Account Details


As and when required, you can modify the following details of the account:

- User Information
  - First Name
  - Last Name
  - Email
  - User Name
  - Locale

## To update the account details

1. Navigate to the **Overview** section > click the **Account Details** link.  
--or--  
Navigate to the **My Account Settings** section.


2. Click the **Edit** icon (  ) to modify the respective details.
3. Enter the details and click **Update**.

 The following API is used to update the account details. For more information, click [here](#).


**PATCH** `https://<URL_of_the_Instance>/api/user-management/v1/users/{userId}`

## 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 [Working With the Home Page](#).

 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](#).

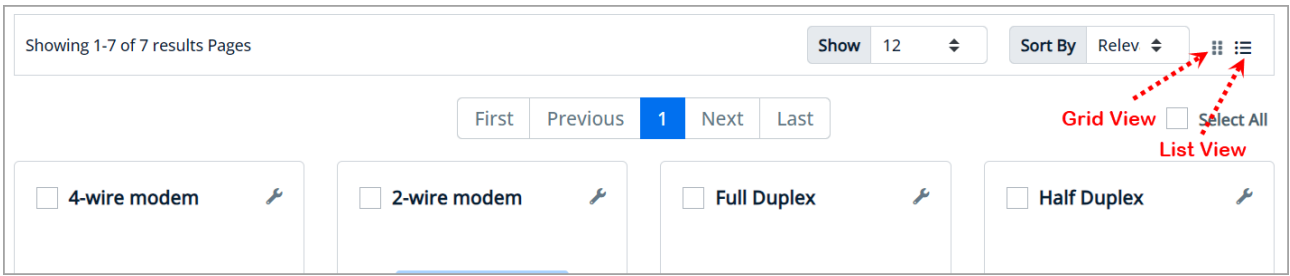
**POST** `https://<URL_of_the_Instance>/api/catalog/v1/search`

**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](#).

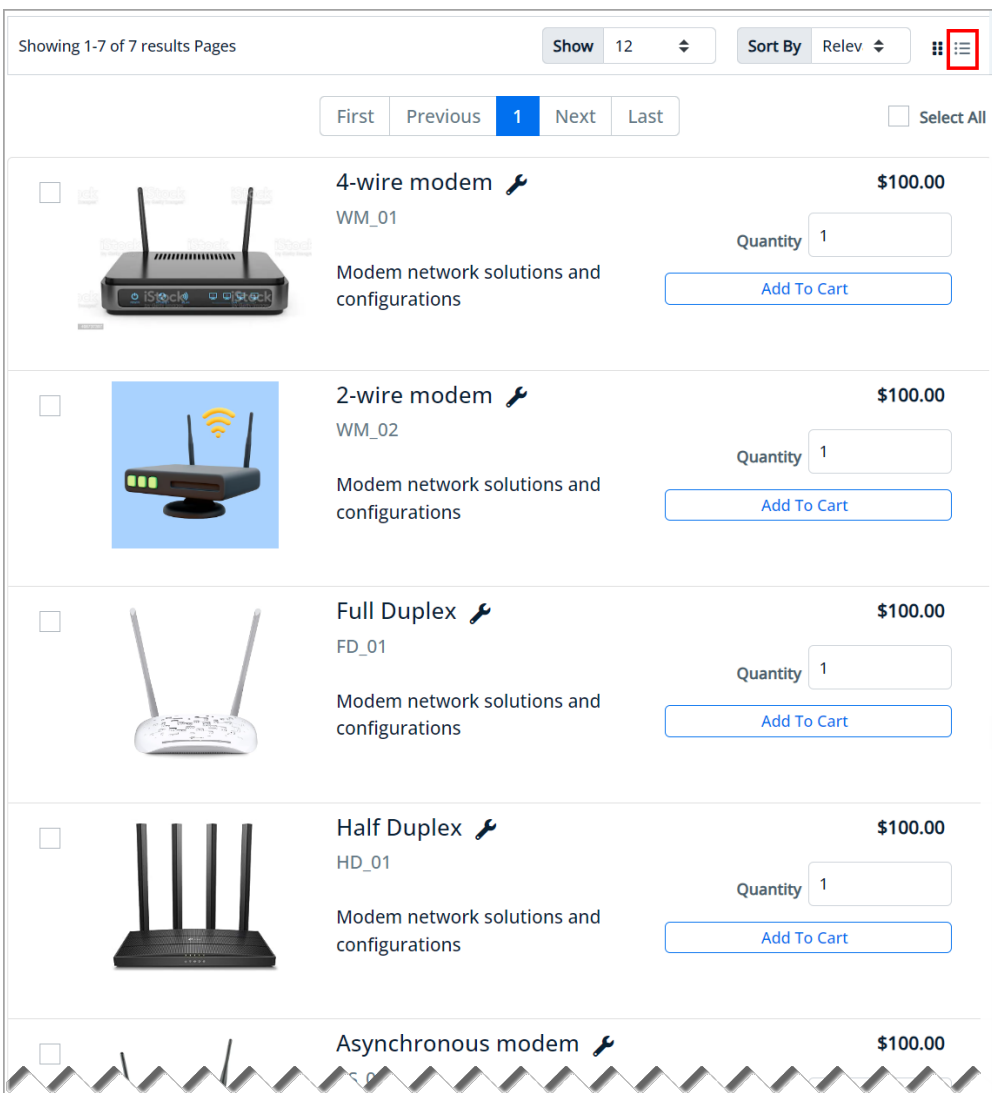
## View Options

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



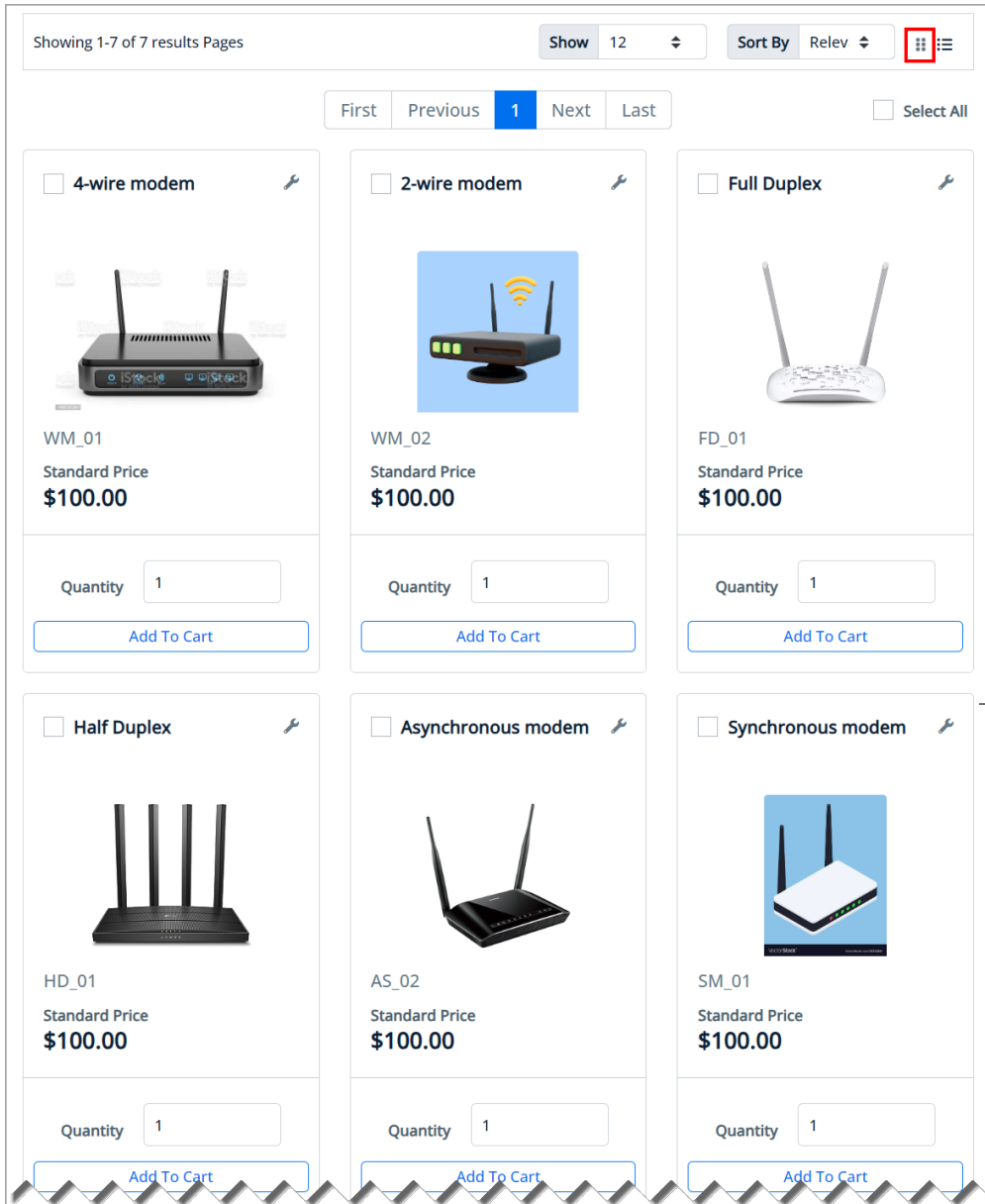
## List View

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.



① 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`

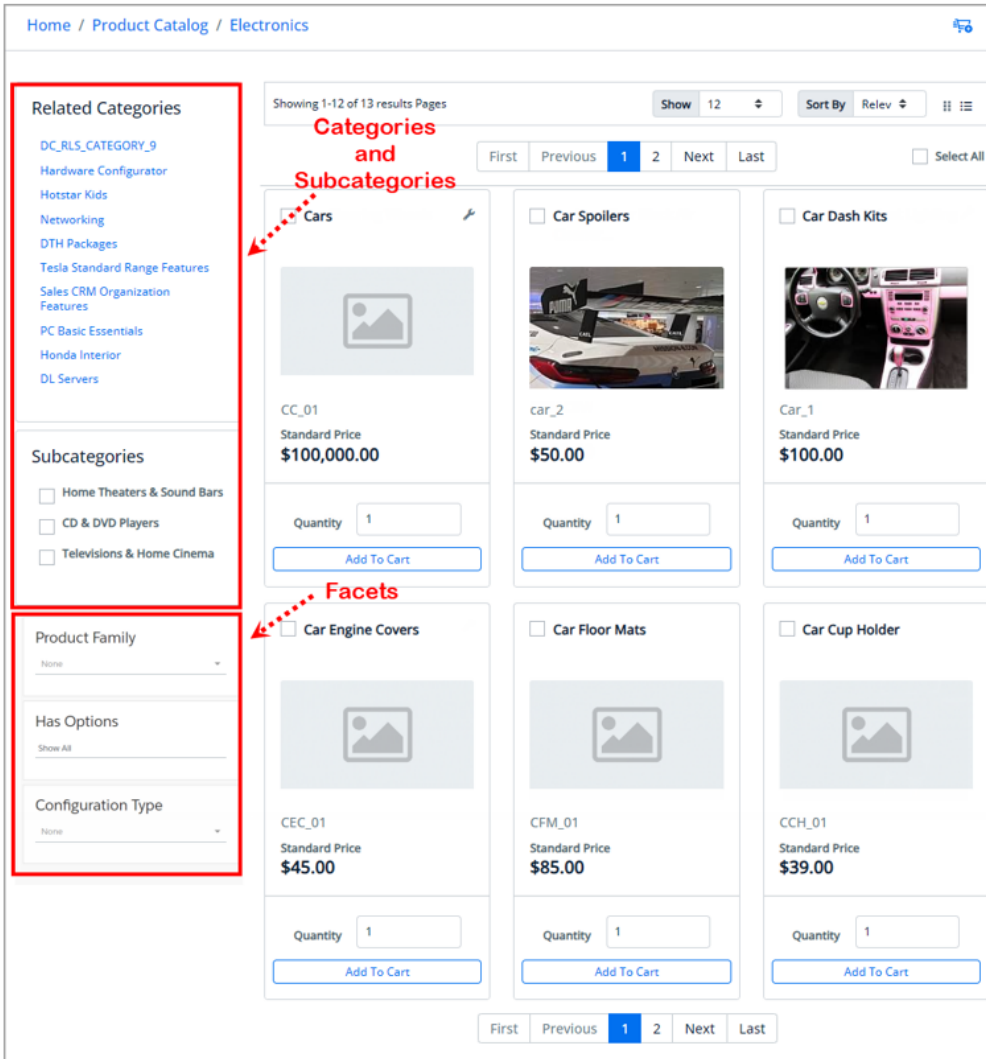
**For example:** `https://<URL_of_the_Instance>/api/catalog/v1/search?search-type=Product&includes=prices&page={pageNumber}&limit={pageLimit}`

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

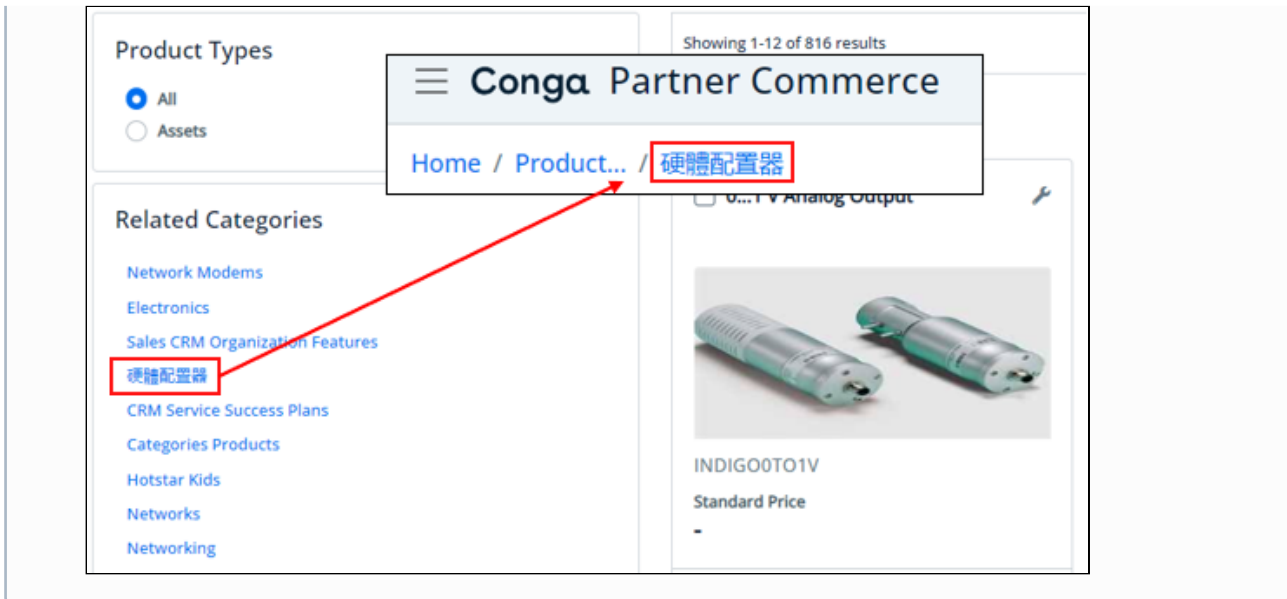
① The implementor can use the *SearchFilterFields* option to display the number of facets for the particular category. For example, if you want to use the **Product Family** and **Configuration Type** facets, pass "SearchFilterFields": ["Family", "Configuration Type"]. For more information, click [here](#).



**i** 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.

**i** 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}`

<b>Without filter</b>	<p><b>GET</b> <code>https://&lt;URL_of_the_Instance&gt;/api/catalog/v1/products</code></p> <p><b>For example:</b> <code>https://&lt;URL_of_the_Instance&gt;/api/catalog/v1/products?sort=ASC(Name)&amp;page={pageNumber}&amp;limit={pageLimit}</code></p>
-----------------------	---

## Viewing product details

Click the product's name or image to view 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 [Get a product's details](#).

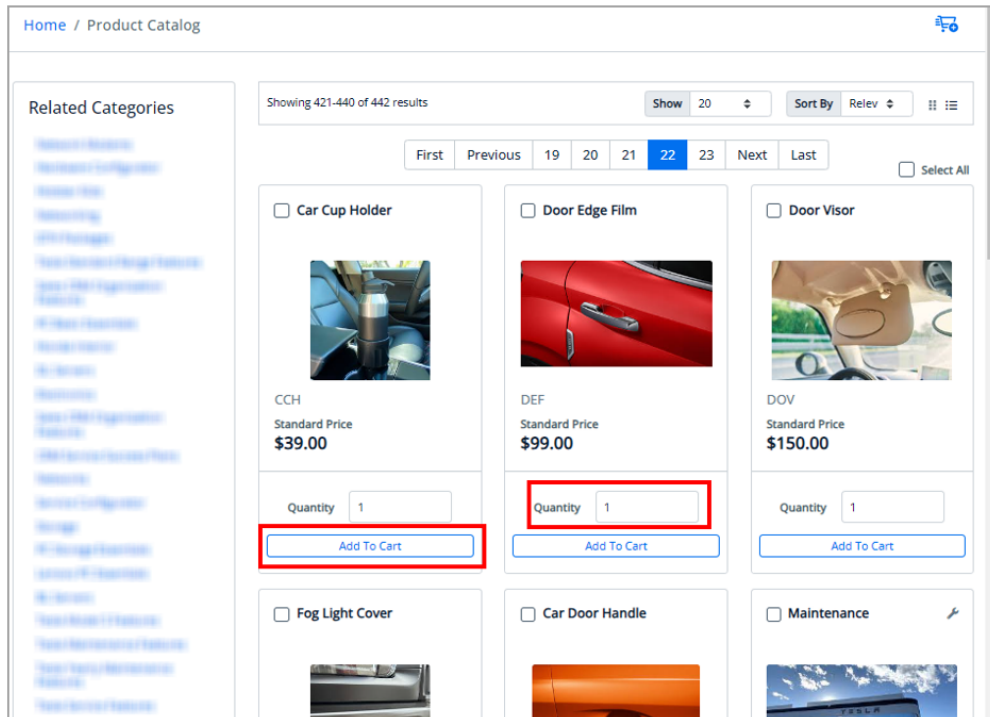
**GET** `https://<URL_of_the_Instance>/api/catalog/v1/products/{productId}`

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

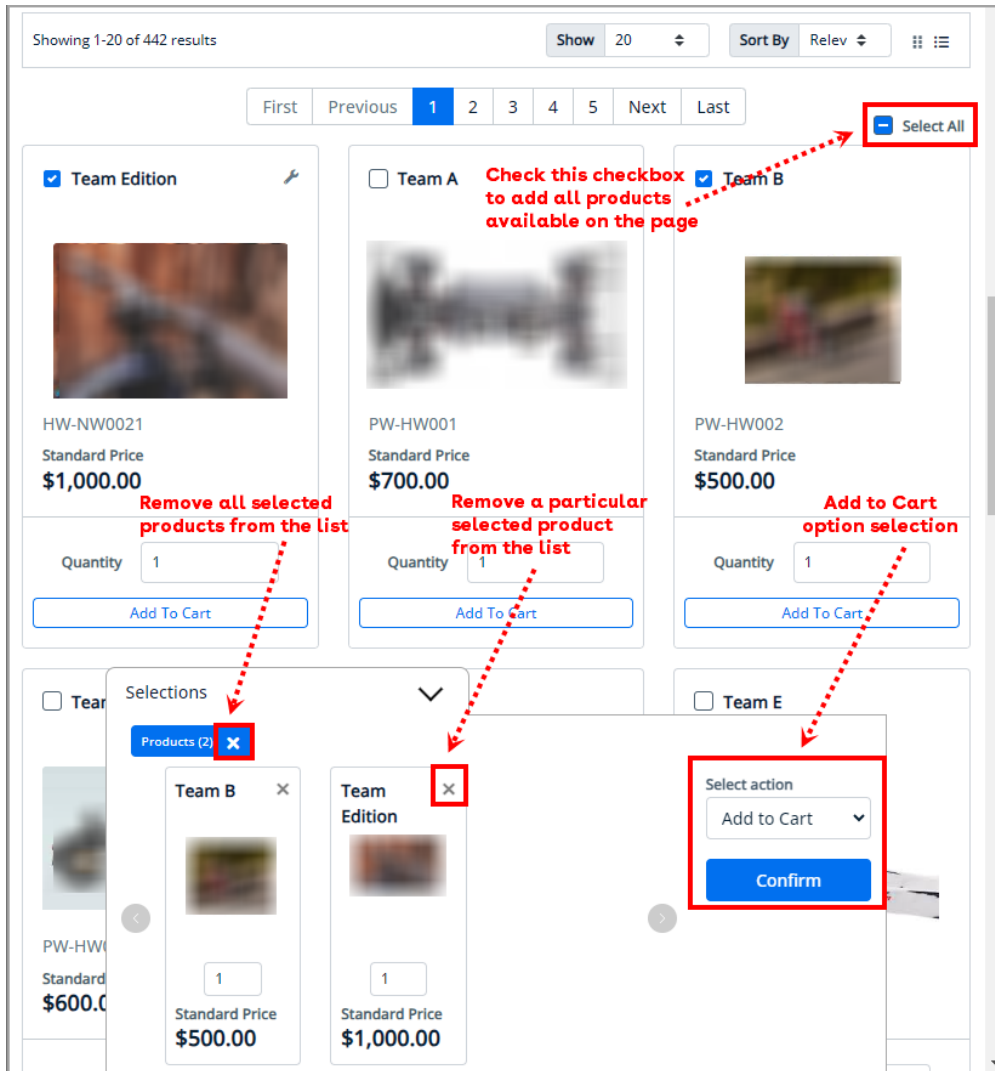
You can add a product or products to your cart by following any of the following paths. Before adding the product to the cart, you can also specify the quantity in the Quantity field.

- 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, adding fewer than 50 items at a time preserves stability and timely responses from the server.



**i** The following API is used to add the product to the cart. For more information, see [Retrieve line items from a cart](#).

**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](#).

For more information on catalog operations, see:


- [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.

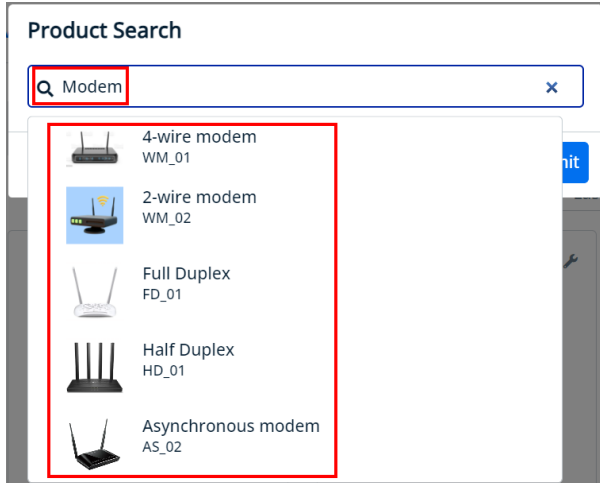
There are two ways you can search for a product.

- 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`

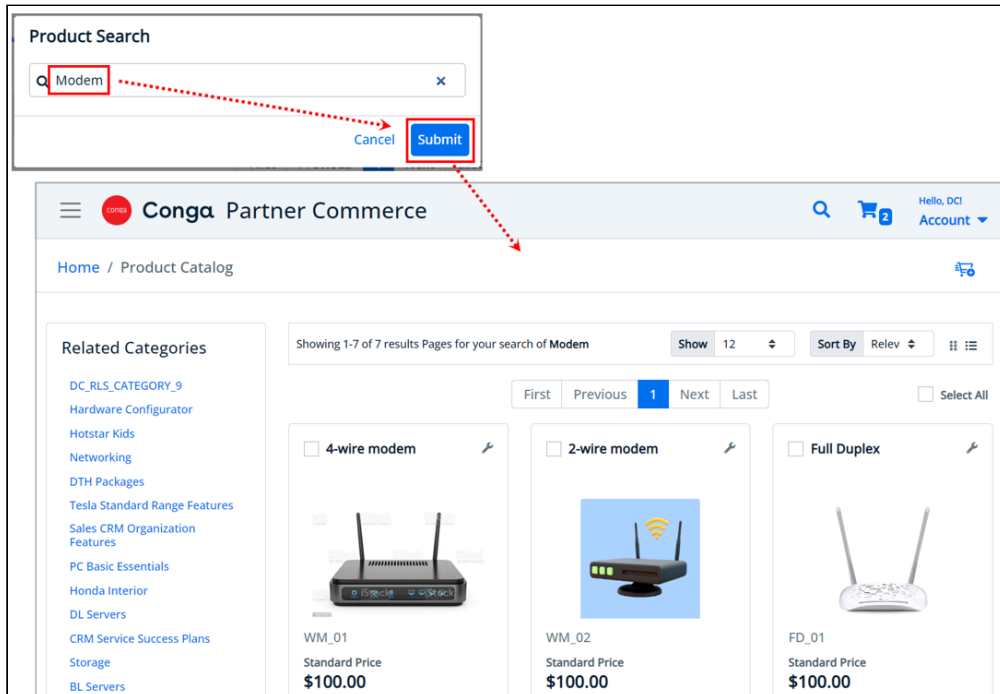


- Click the **Search** icon and enter a few keywords or a whole keyword including space and press **Enter** on your keyboard. A list of products is displayed matching the entire keywords you entered.

**i** 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?*"

i 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:** Provide 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.

## 2-wire Modem

WM\_02

Standard Price

\$100.00

Net Price


\$200.00

Details
Configurations
Specifications
Recommended Products

Quantity

Add To Cart





Price Summary



2-wire Modem complex

### Configurations

Wire Modem


<input checked="" type="checkbox"/>	 <p style="margin: 0; font-weight: bold;">1-wire Modem</p> <p style="margin: 0; font-size: small;">1-wire Modem complex</p>	<input type="checkbox"/> Is Optional	Price	Qty
			\$100.00	1
<input type="checkbox"/>	 <p style="margin: 0; font-weight: bold;">3-wire Modem</p> <p style="margin: 0; font-size: small;">3-wire Modem complex</p>		Price	Qty
			\$100.00	1
<input type="checkbox"/>	 <p style="margin: 0; font-weight: bold;">5-wire Modem</p> <p style="margin: 0; font-size: small;">5-wire Modem complex</p>		Price	Qty
			\$200.00	1
<input type="checkbox"/>	 <p style="margin: 0; font-weight: bold;">6-wire Modem</p> <p style="margin: 0; font-size: small;">6-wire Modem complex</p>		Price	Qty
			\$200.00	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

Add To Cart

Saw



202


Standard Price

\$500.00

Quantity

Add To Cart

DTH Connection



203


Standard Price

\$5,000.00

Quantity

Add To Cart

Technical Writer



TLWR

Standard Price

\$500.00

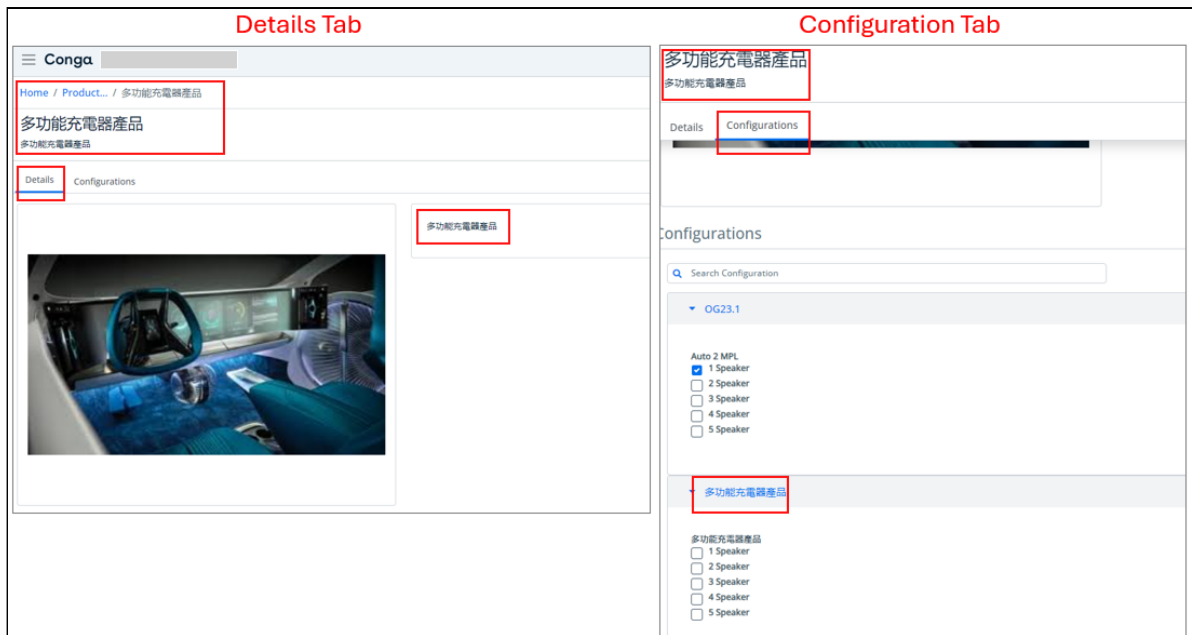
Quantity

Add To Cart

① 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.

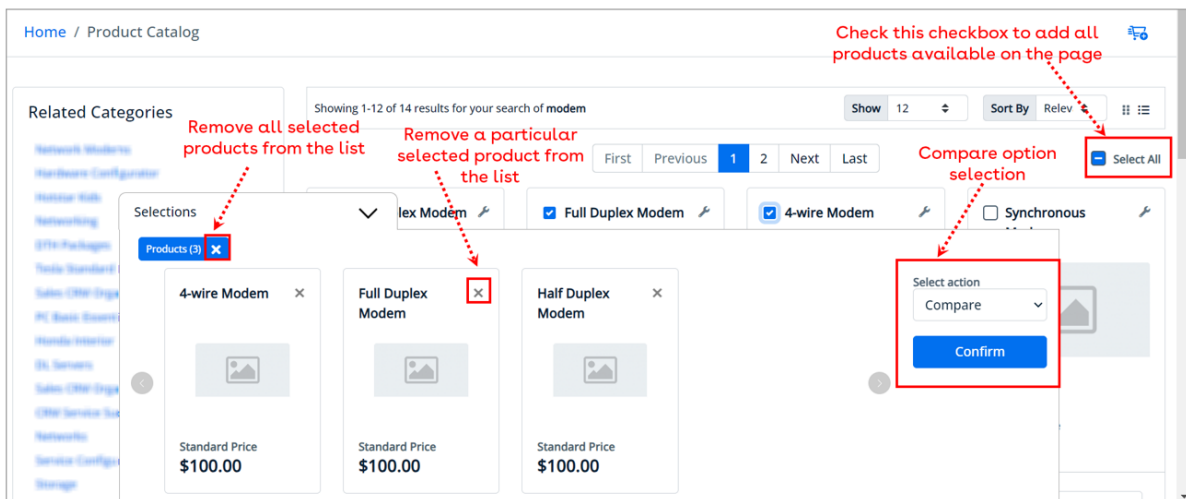
- 3. **Time-Saving:** Instead of navigating back and forth between product pages, you can quickly assess different products on a single page.
- 4. **Customization and Personalization:** You can find products that best match your preferences and needs, ultimately leading to a more satisfying shopping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

## Compare Products

Every product card on the Catalog page 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 (X)** icon.


**Info**

- 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.

**4-wire modem**




WM\_01  
Standard Price  
**\$100.00**

Quantity

[Add To Cart](#)

**2-wire modem**




WM\_02  
Standard Price  
**\$100.00**

Quantity

[Add To Cart](#)

**Full Duplex**



FD\_01  
Standard Price  
**\$100.00**

Quantity




[Add To Cart](#)

Common Features			
<b>Network Features</b>			
<b>Network Type</b>	VPN	MAN	WAN
<b>Bandwidth</b>	200m	120m	150m
<b>Device Type</b>	Computer, Smartphones, Tablets	Computer, Smartphones, Tablets, Switches	Computer, Gateways, Switches
<b>Connectivity</b>	Virtual Connections with tunneling protocols	Fiber Optics, Ethernet, wireless, Cellular	Fiber Optics, Ethernet, wireless, Cellular
<b>Call Facility</b>			
<b>Storage</b>	100numbers	-	10numbers
<b>Speakerphone</b>	Not Available	Yes	Yes
<b>Progress Detection</b>	-	10minites	-
<b>Telephony</b>			
<b>Digital Line Guard</b>	Yes	Yes	-
<b>Caller ID</b>	-	-	Yes
Non common Features			
<b>Other Features</b>			
<b>Data Speed</b>	High	-	-
<b>Reliable BackUp</b>	Computer	-	-

Selections ^

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.

**Additional File storage, PromoScope\_ANDOR\_9 does not have comparable features to the selected products**

 <p><b>Additional File storage</b></p> <p>GA_05 Standard Price <b>\$100.00</b></p> <p>Quantity <input type="text" value="1"/></p> <p><a href="#">Add To Cart</a></p>	 <p><b>PromoScope_ANDOR_9</b></p> <p>PA_9 Standard Price <b>\$5,000.00</b></p> <p>Quantity <input type="text" value="1"/></p> <p><a href="#">Add To Cart</a></p>	 <p><b>4-wire modem</b></p> <p>WM_01 Standard Price <b>\$100.00</b></p> <p>Quantity <input type="text" value="1"/></p> <p><a href="#">Add To Cart</a></p>
---	--	--

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.

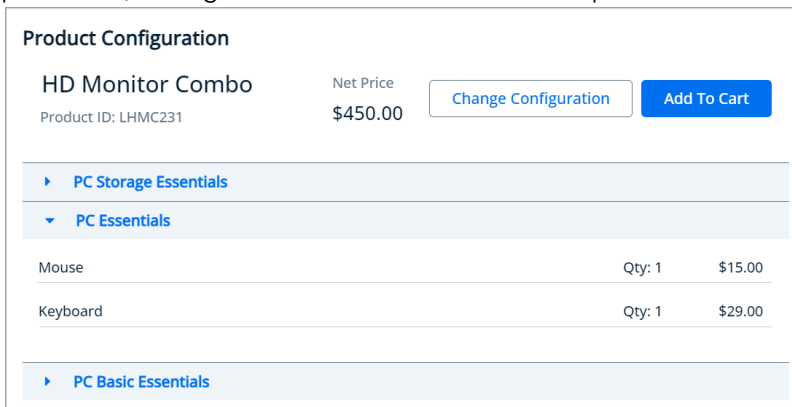


 Although there is no limit to the number of products that can be added to the cart at once, it is recommended that you add up to 50 items to avoid operations failing or taking too long to finish.

## 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.

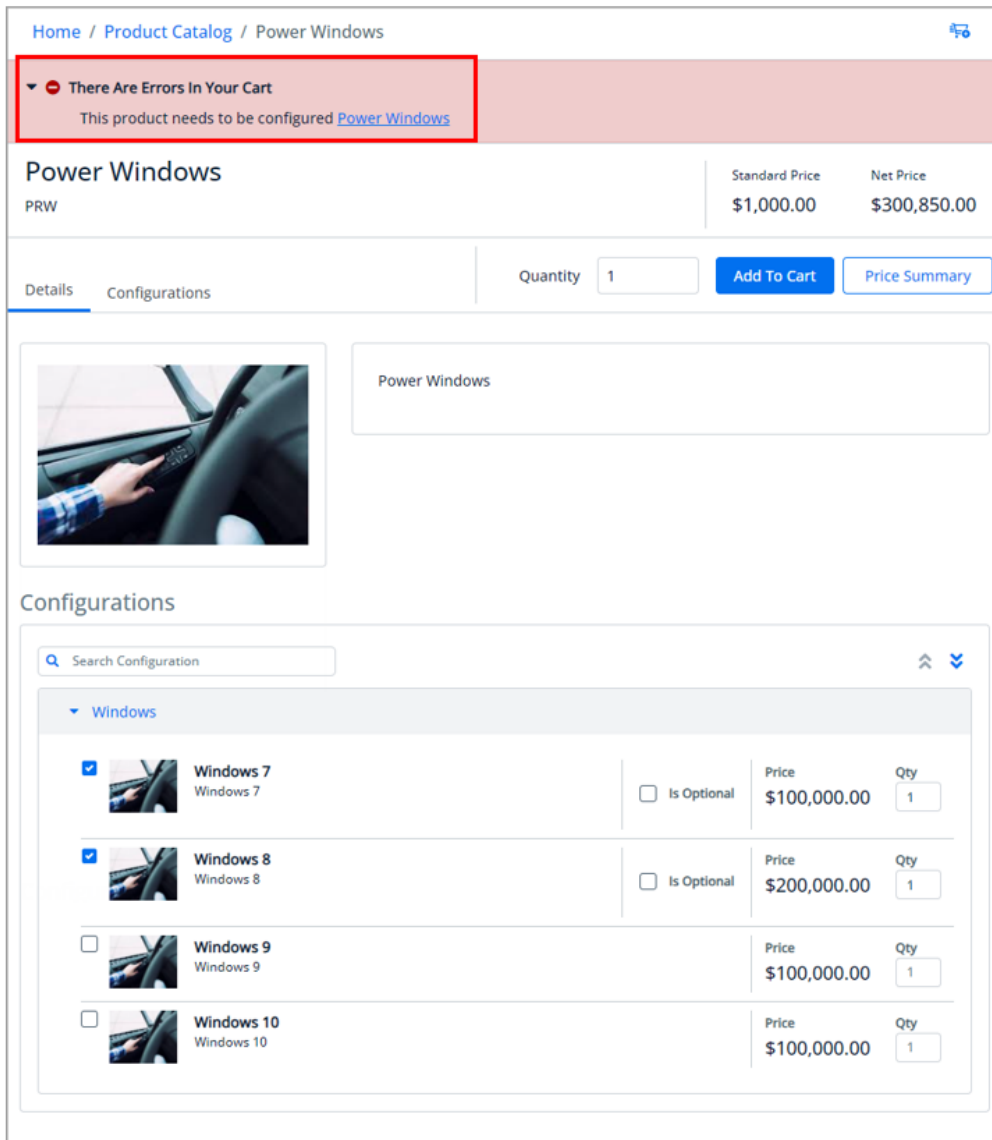


The screenshot shows a 'Product Configuration' window for 'HD Monitor Combo' (Product ID: LHMC231) with a net price of \$450.00. It features a 'Change Configuration' button and an 'Add To Cart' button. Below the product name, there are three expandable sections: 'PC Storage Essentials', 'PC Essentials', and 'PC Basic Essentials'. The 'PC Essentials' section is currently expanded, showing a list of items:

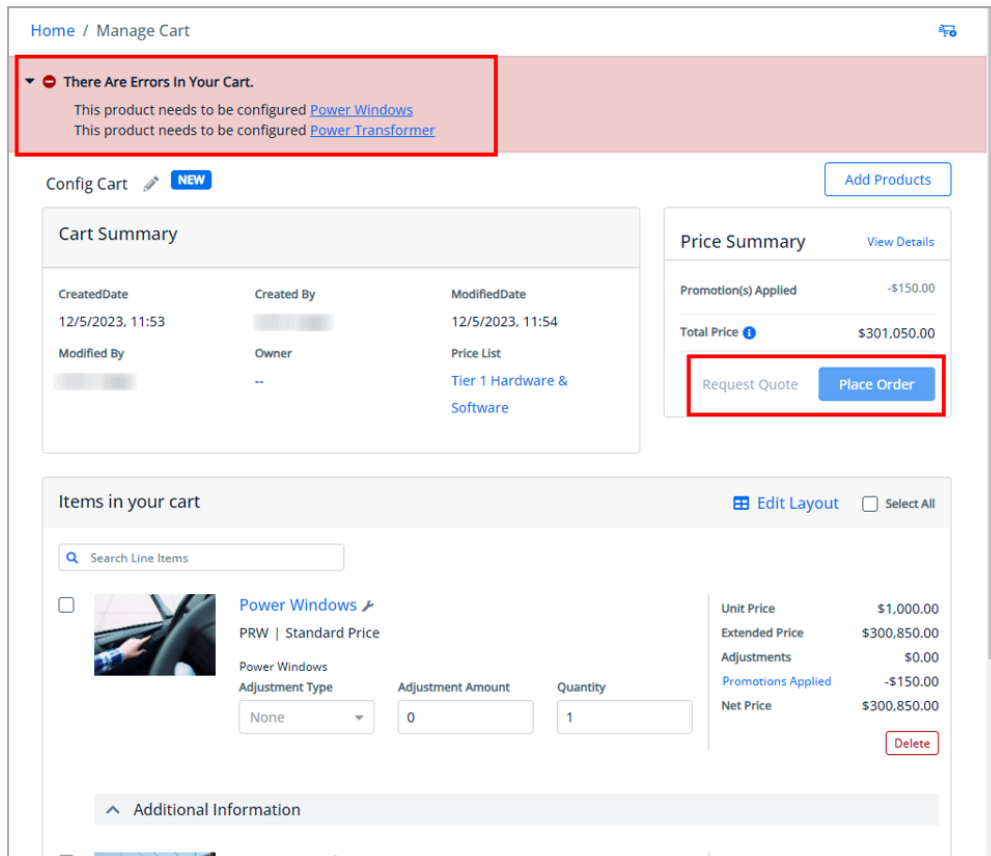
Item	Qty	Price
Mouse	1	\$15.00
Keyboard	1	\$29.00

- 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.



**i** 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.

**i** 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 is taking more time than expected, the application will attempt fetching the cart status again for the number of retry attempts and the delay between each attempt specified when [configuring cart pricing status retry settings](#). If the price process of the cart still takes more time, the following options will appear on the screen:



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

- **Abandon Cart:** The current cart will be deactivated and a new cart will be created. 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 the option group level, you can click the error and see the list of errors in the popup.

#### **Validation and Inclusion/Exclusion Error**

2 errors found. [View Details](#)

Team J is included on the addition of Team B [Add To Cart](#)

### 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

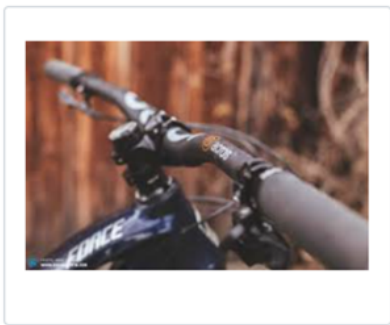
Qty 1 [Add To Cart](#)

## Team Edition

HW-NW0021

Details Configurations

Quantity 1



Team Edition complex

## Configurations

Search Configuration

Edition A

Configuration	Price	Qty	Optional
<input checked="" type="checkbox"/> <b>Team A</b> Team A complex	\$700.00	1	<input type="checkbox"/>
<input checked="" type="checkbox"/> <b>Team B</b> Team B complex	\$4,500.00	1	<input type="checkbox"/>
<input type="checkbox"/> <b>Team C</b> Team C complex	\$600.00	1	<input type="checkbox"/>
<input checked="" type="checkbox"/> <b>Team F</b> Team F complex	\$5,500.00	1	<input type="checkbox"/>
<input type="checkbox"/> <b>Team G</b> Team G complex	\$8,500.00	1	<input type="checkbox"/>
<input type="checkbox"/> <b>Team H</b> Team H complex	\$3,500.00	1	<input type="checkbox"/>

Edition B

<input type="checkbox"/> <b>Team I</b> Team I complex	\$4,500.00	1	<input type="checkbox"/>
<input type="checkbox"/> <b>Team L</b> Team L complex	\$200.00	1	<input type="checkbox"/>

### Product(s) Included / Excluded

Team I is included on the addition of Team A

Team I	Price \$4,500.00	Qty 1	<a href="#">Add</a>
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## Configuration Error

### Cart and Other Page

### Product Configuration Page

## Product Configuration

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

**i** 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.

**i 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 fulfills 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	<ul style="list-style-type: none"> <li>Picklist</li> <li>Multi-picklist</li> </ul>	To restrict the visibility of values on the target field.
Default	<ul style="list-style-type: none"> <li>Number</li> <li>Text</li> <li>Picklist</li> <li>Multi-picklist</li> </ul>	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 *CPQ Admin > 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 *CPQ Admin > 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.

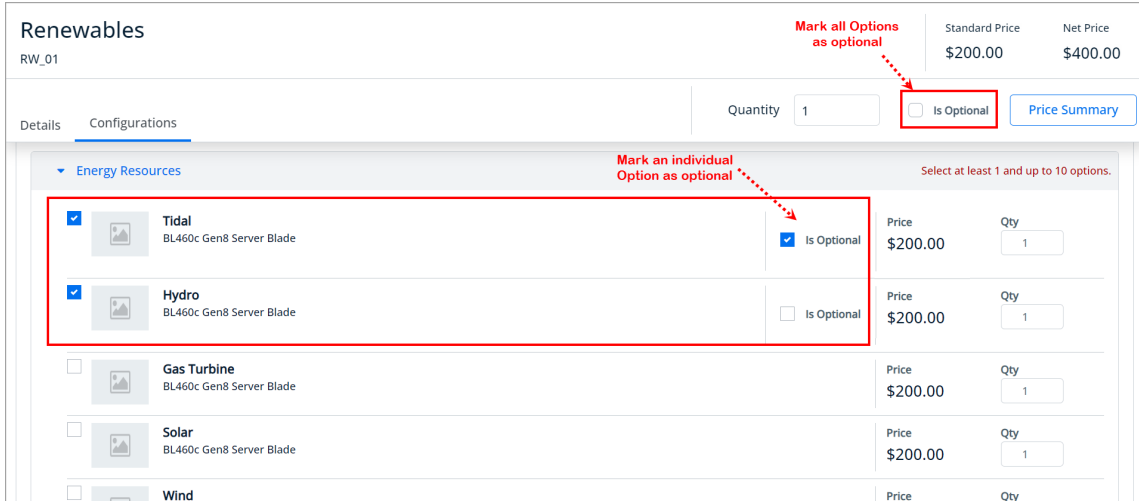
Setting the modifiable type setting to **Fixed** or **Variable** impacts only on immediate options. There is no impact on the sub-option groups. This setting has to be done on each level. This also overrides minimum and maximum validation. In case you select an option group with **Modifiable Type** as **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 **Is Required** flag for an option product in CPQ Admin. 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.



## 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 Rules](#)
- [Working with Replacement Rules](#)


## 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

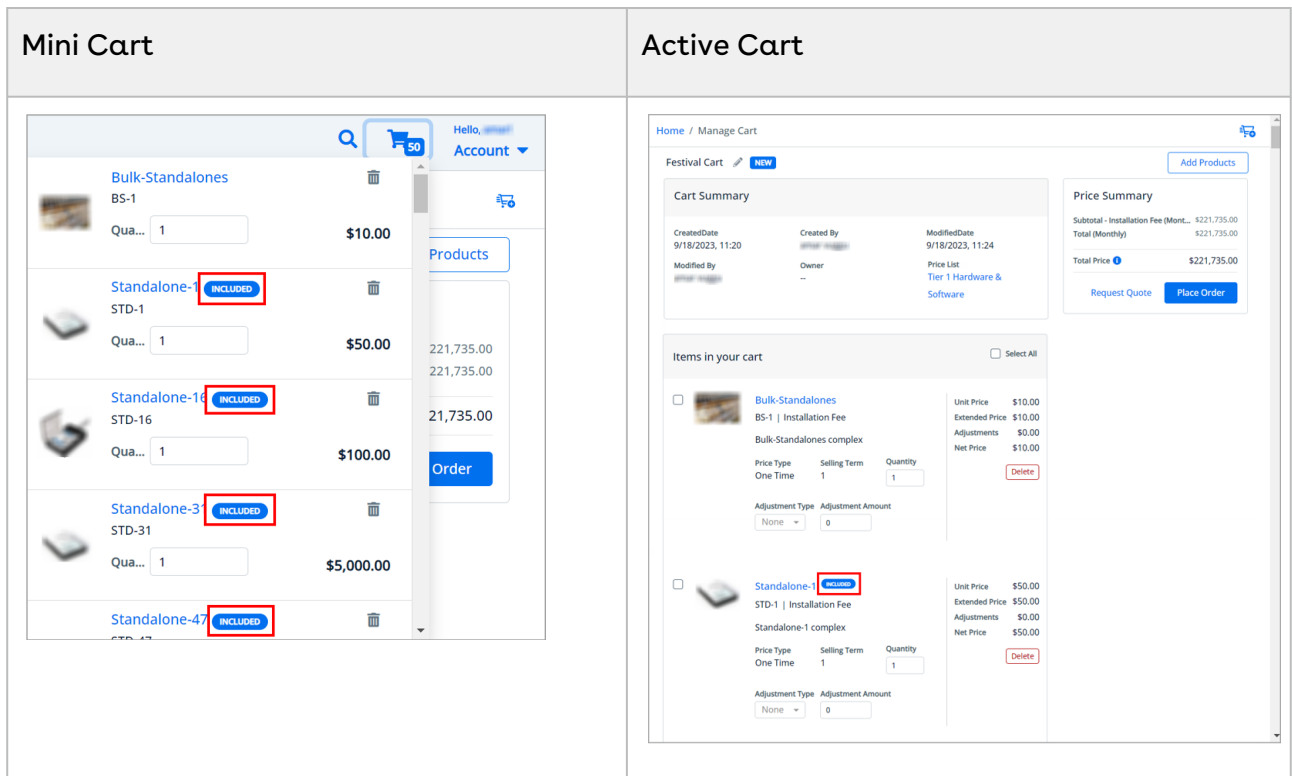
3) Prompt (as per design, displays an error message) acts similarly to *Show Message* in the case of Catalog products.

 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 Active Cart.



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 Partner Commerce

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

Team	Price	Qty	Optional
<input checked="" type="checkbox"/> <b>Team A</b> Team A complex	\$700.00	1	<input type="checkbox"/>
<input checked="" type="checkbox"/> <b>Team B</b> Team B complex	\$500.00	1	<input type="checkbox"/>
<input type="checkbox"/> <b>Team C</b> Team C complex	\$600.00	1	<input type="checkbox"/>
<input checked="" type="checkbox"/> <b>Team F</b> Team F complex	\$5,500.00	1	<input type="checkbox"/>
<input type="checkbox"/> <b>Team G</b> Team G complex	\$8,500.00	1	<input type="checkbox"/>
<input type="checkbox"/> <b>Team H</b> Team H complex	\$3,500.00	1	<input type="checkbox"/>

Edition B

<input type="checkbox"/> <b>Team I</b> Team I complex	\$4,500.00	1	<input type="checkbox"/>
<input type="checkbox"/> <b>Team L</b> Team L complex	\$200.00	1	<input type="checkbox"/>
<input type="checkbox"/> <b>Team M</b> Team M complex	\$100.00	1	<input type="checkbox"/>
<input checked="" type="checkbox"/> <b>Team N</b> Team N complex			<input type="checkbox"/>

#### 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](#)

#### Product(s) Included / Excluded

Team I is included on the addition of Team A

Team	Price	Qty
Team I	\$4,500.00	1

[Add](#)

#### Product(s) Included / Excluded

Team F is excluded on the addition of Team N

## 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 Rules

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.

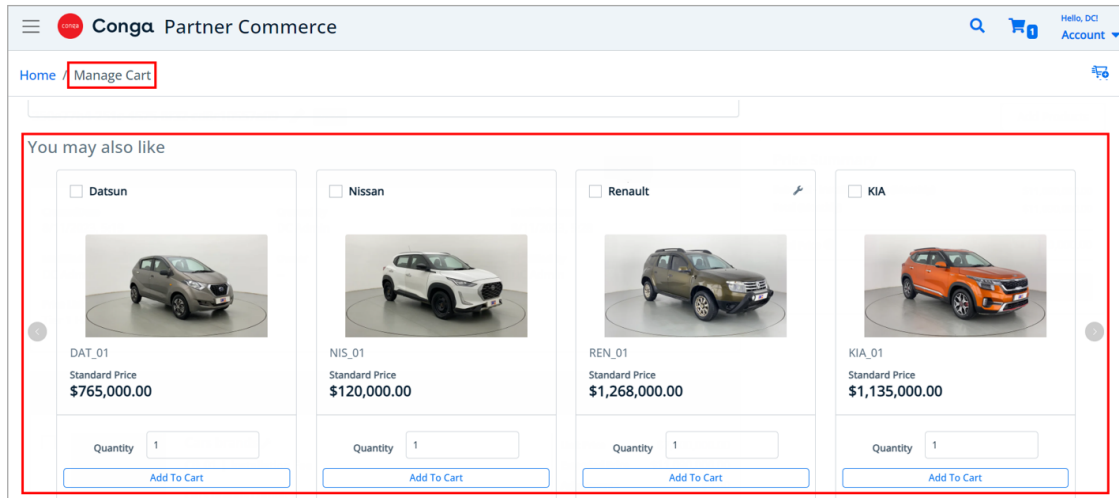
- **Product Details** page: You can see the list of recommended products under the **Recommended Products** tab and you can also add recommended products directly from the list.

The screenshot shows a product details page for 'Cars brands' (CB\_01). At the top right, the 'Standard Price' is \$7,800,000.00 and the 'Net Price' is \$11,090,000.00. Below the product name, there are tabs for 'Details', 'Configurations', and 'Recommended Products' (which is highlighted with a red box). To the right of the tabs are a 'Quantity' input field set to 1, an 'Add To Cart' button, and a 'Price Summary' button. The 'Recommended Products' section is also highlighted with a red box and contains four product cards:

Brand	ID	Standard Price
Datsun	DAT_01	\$765,000.00
Nissan	NIS_01	\$120,000.00
Renault	REN_01	\$1,268,000.00
KIA	KIA_01	\$1,135,000.00

Each card includes a car image, a checkbox, the brand name, ID, standard price, a quantity input field (set to 1), and an 'Add To Cart' button.

- **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 Rules

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**, **Product Family**, and **Product Group**:

- 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



- Product Group → Product Group
- Product Family → Product Family
- Standalone → Product Group
- Standalone → Product Family
- Option → Option in the Option Group

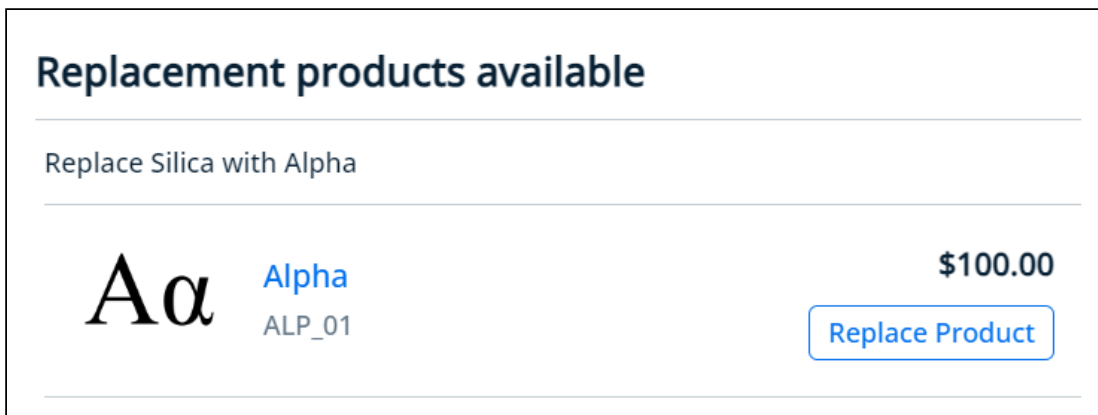
The following are the supported types of Action Intent:

Action Intent	Description
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**

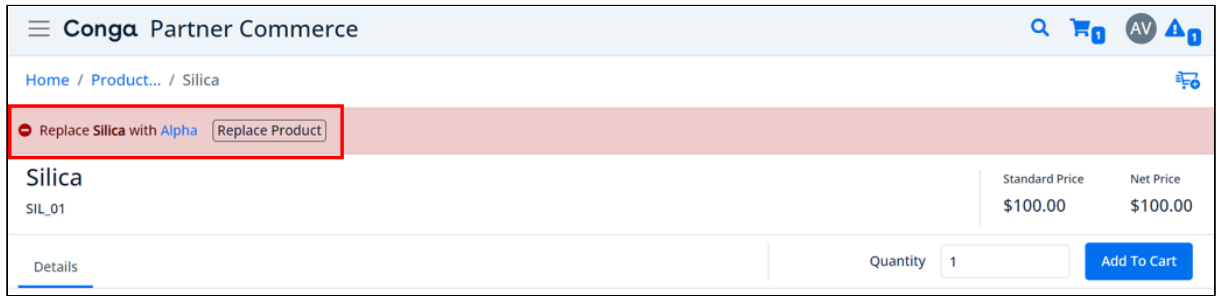
When you add a product configured with a replacement rule set to 'Prompt,' the application displays a modal to replace the product. Click **Replace Product** to replace the product in the cart.



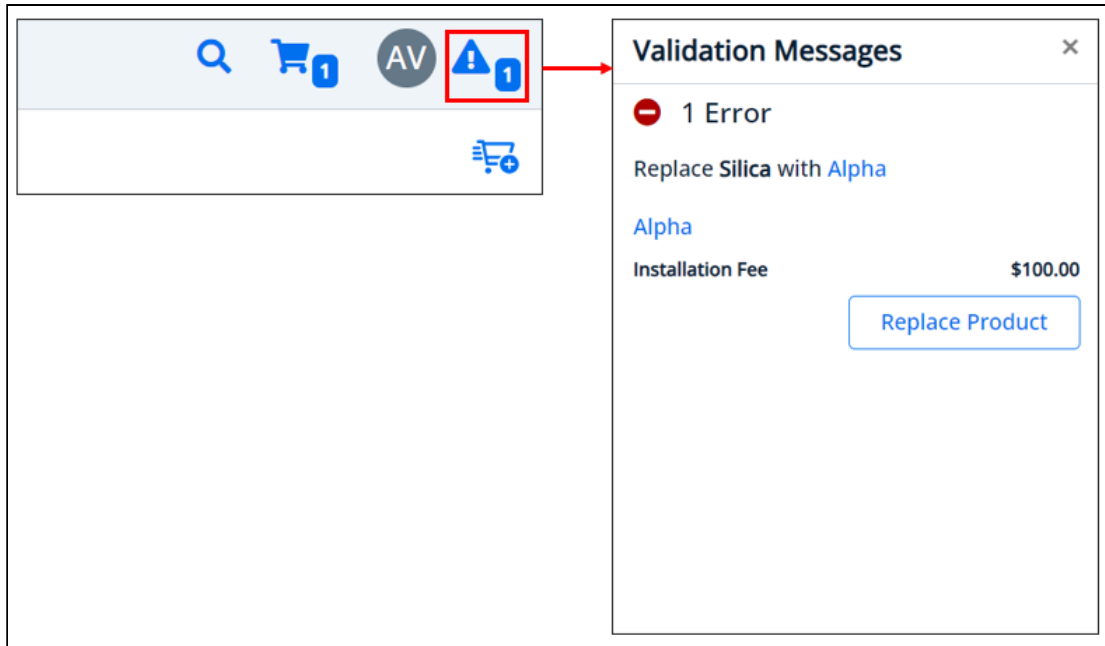
**Show Message**

- 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

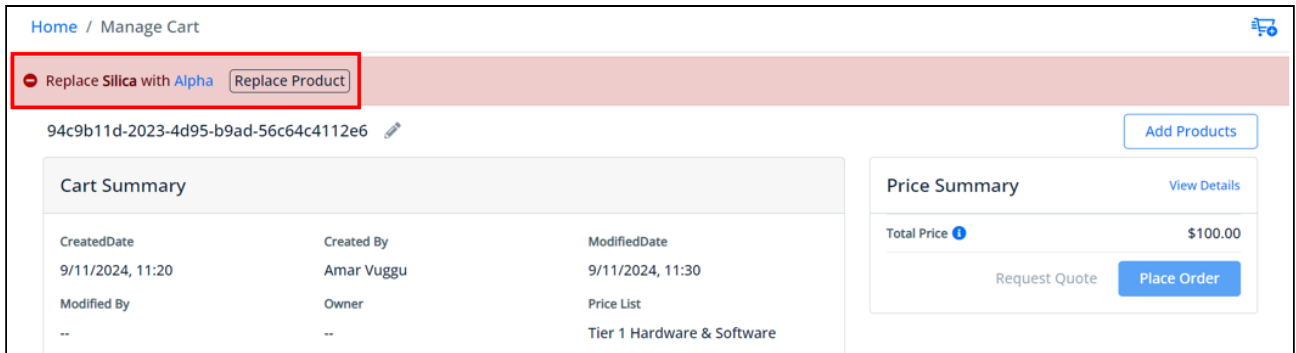
the cart.



• Validation Message



Show Message on Cart




Bundle to Bundle

### Replacement products available

---

Replace BU\_RPLT\_3 with BU\_RPLT\_1

---



**BU\_RPLT\_1**

BRT-01

**\$8,000.00**


[Replace Product](#)

### Multiple Bundle to Standalone

### Replacement products available

Replace BU\_RPLT\_MC7, BU\_RPLT\_MC8, BU\_RPLT\_MC9 with RPLT\_SP2

---



**RPLT\_SP2**

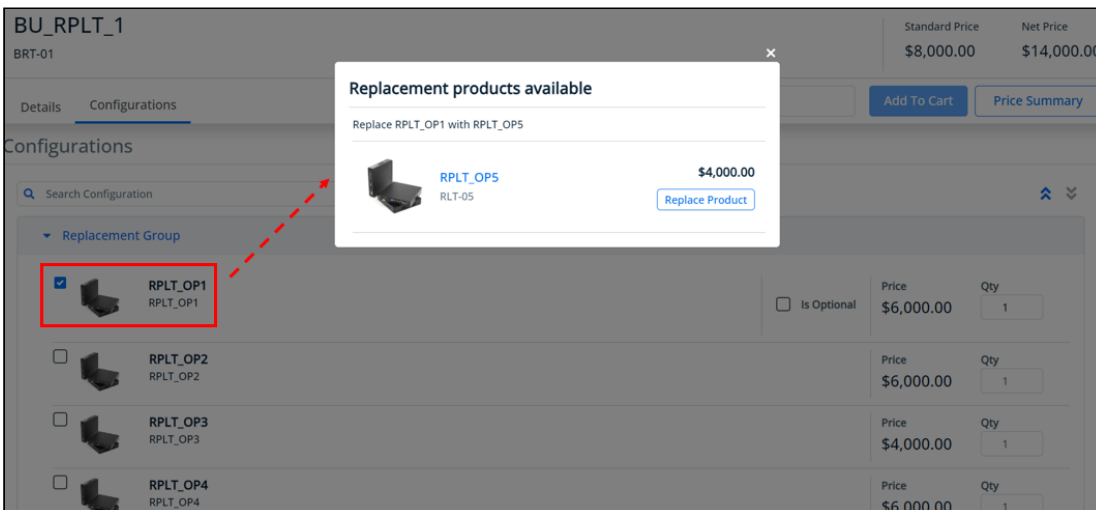
RLT-SP2

**\$9,000.00**

[Replace Product](#)

### Option to Option in Bundle

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



The screenshot shows a configuration page for 'BU\_RPLT\_1' (BRT-01) with a standard price of \$8,000.00 and a net price of \$14,000.00. A modal window titled 'Replacement products available' is open, displaying the instruction 'Replace RPLT\_OP1 with RPLT\_OP5'. The modal shows a product image for RPLT\_OP5 (RLT-05) with a price of \$4,000.00 and a 'Replace Product' button. In the background, a list of options is visible under a 'Replacement Group' header. RPLT\_OP1 (RPLT\_OP1) is selected with a checked checkbox and highlighted by a red box. Other options include RPLT\_OP2 (\$6,000.00), RPLT\_OP3 (\$4,000.00), and RPLT\_OP4 (\$6,000.00). A red dashed arrow points from the selected RPLT\_OP1 option to the replacement modal.

### Product Group to Product Group

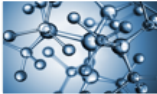


- When you select a product group, the rule gets triggered to replace with another product group. When you click View Details, the Validation Message appears on the right side to replace product.

The screenshot shows a product catalog page with a navigation breadcrumb "Home / Product Catalog". A red box highlights a product rule: "Replace Biology, Chemistry, Physics with Physics1, Biology1, Chemistry1" with a "View Details" button. A red dashed arrow points from this button to a "Validation Messages" modal window on the right. The modal window displays "1 Error" and lists three replacement options, each with an "Installation Fee" of \$100.00 and a "Replace Product" button:

- Physics1: Installation Fee \$100.00
- Biology1: Installation Fee \$100.00
- Chemistry1: Standard Price \$100.00

- Prompt

The prompt is titled "Replacement products available" and contains the following text: "Replace Material Science, Medical Science, Life Science with Life Science1, Medical Science1, Material Science1". Below this, three replacement products are listed, each with an image, name, code, price, and a "Replace Product" button:

Image	Product Name	Code	Price	Action
	Material Science1	MTR	\$100.00	Replace Product
	Medical Science1	alg	\$100.00	Replace Product
	Life Science1	alg	\$100.00	Replace Product

## Product Family to Product Family

- Show Message

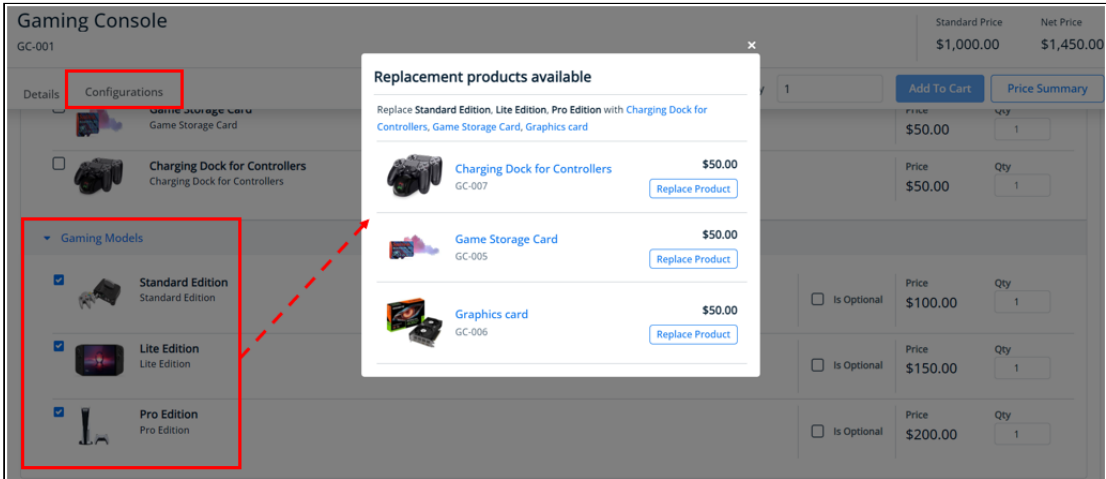
The screenshot shows a product catalog page with a breadcrumb trail: Home / Product Catalog. A red-bordered message box contains the text: "Replace Number Theory, Calculus with Geometry, Algebra" and a "View Details" button. A red dashed arrow points from this message to a "Validation Messages" modal window. The modal window displays "1 Error" and lists two replacement options: "Geometry" with an "Installation Fee" of \$100.00 and a "Replace Product" button, and "Algebra" with an "Installation Fee" of \$100.00 and a "Replace Product" button.

- Prompt

The screenshot shows a "Replacement products available" prompt. It displays the text: "Replace Calculus1, Number Theory1 with Trigonometry, Geometry1". Below this, two replacement options are listed:

Product Name	Code	Price	Action
Trigonometry	alg	\$10.00	Replace Product
Geometry1	alg	\$10.00	Replace Product

## Option to Option in the Option Group

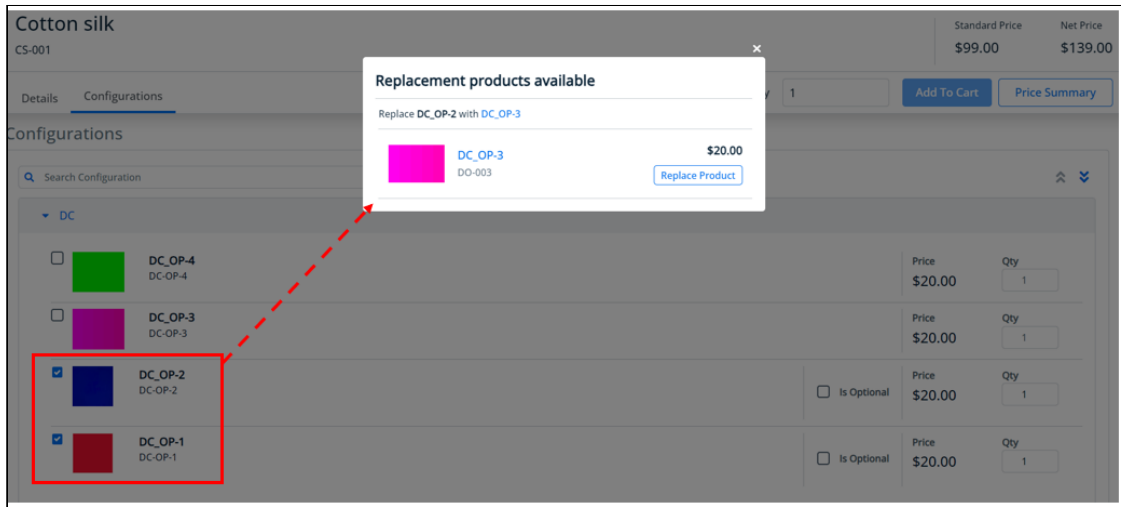


### Auto-Inclusion with Automatic Product Replacement

Auto-inclusion of a product prevents its removal but allows automatic replacement of other products.

Example:

- Auto-include "Cotton Silk" *DC\_OP-2* prevents you from auto-removing the *DC\_OP-1*.
- Auto-include "Cotton Silk" *DC\_OP-2* allows you to auto-replace it with *DC\_OP-3*.



### 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	<ul style="list-style-type: none"> <li>• Picklist</li> <li>• Multi-picklist</li> </ul>	To restrict the visibility of values on the target field.
Default	<ul style="list-style-type: none"> <li>• Number</li> <li>• Text</li> <li>• Picklist</li> <li>• Multi-picklist</li> </ul>	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.

Action Type	Data Type Supported	Description
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 its users. A laptop has five attributes: Color, HDD, RAM, Screen Size, and Fingerprint Reader. The following table describes the products and their 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 (integer digit change). 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 (decimal digit change). Consider the following:
  - If a Pricelist is deactivated, expired, or deleted
  - Any pricing changes without product version change
  - A product version changes 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	
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:

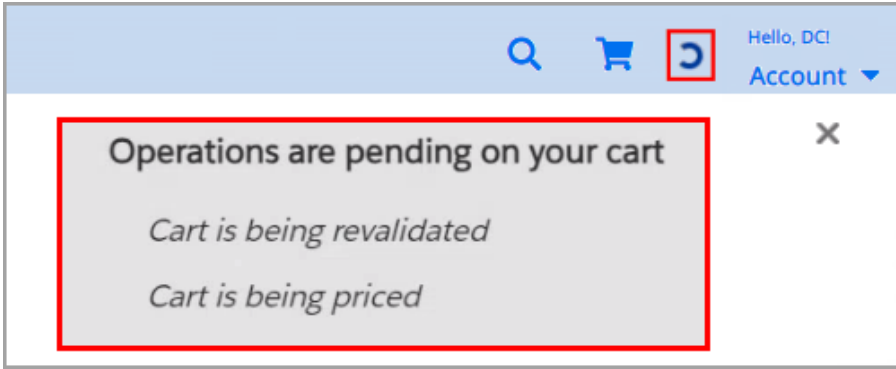
- Reload the application or page
- Switch the cart
- Cart actions (Add or Delete line items)
- Edit quote or order

**i** 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.

Revalidation Popup	Revalidation Link																																				
<div data-bbox="170 521 612 696"> <p><b>Revalidation required</b> The configuration of the following items in your cart has changed and need to be revalidated</p> <table border="1"> <thead> <tr> <th>Product Name</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> GKH Option_14</td> <td>To be revalidated (required)</td> </tr> <tr> <td><input type="checkbox"/> 2002SR</td> <td>To be revalidated (optional)</td> </tr> </tbody> </table> <p><small>If you are not sure of what to do, you can deactivate this cart for now</small></p> <p><small><b>i</b> If you select an optional product, the entire bundle including other optional products too will be revalidated to maintain sanctity of the bundle product</small></p> <p style="text-align: right;"><a href="#">Revalidate</a></p> </div>	Product Name	Status	<input checked="" type="checkbox"/> GKH Option_14	To be revalidated (required)	<input type="checkbox"/> 2002SR	To be revalidated (optional)	<div data-bbox="646 521 1592 1014"> <p>Home</p> <p><b>Some items in your cart need to be validated</b> <a href="#">Validate Cart</a></p> <div style="display: flex; justify-content: space-between;"> <div data-bbox="646 622 837 1014"> <p><b>DA</b> DC Admin</p> <ul style="list-style-type: none"> <li>Overview</li> <li>My Orders</li> <li>My Quotes</li> <li>My Carts</li> <li>My Favorites</li> <li>Product Catalog</li> <li>My Account Settings</li> </ul> </div> <div data-bbox="837 622 1082 728"> <p><b>Orders this week</b> <a href="#">WEEKLY</a></p> <p style="text-align: center;">44</p> </div> <div data-bbox="1082 622 1326 728"> <p><b>Quotes this week</b> <a href="#">WEEKLY</a></p> <p style="text-align: center;">13</p> </div> <div data-bbox="1326 622 1592 728"> <p><b>Total ordered amount</b> <a href="#">TOTAL</a></p> <p style="text-align: center;">\$1,855,514.00</p> </div> </div> <div data-bbox="837 728 1592 1014"> <p><b>Recent Orders</b> <a href="#">Show more &gt;</a></p> <table border="1"> <thead> <tr> <th>Order Name</th> <th>Order Amount</th> <th>Created Date</th> </tr> </thead> <tbody> <tr><td><a href="#">New Order</a></td><td>\$850.00</td><td>9/19/2023, 8:31</td></tr> <tr><td><a href="#">New Order</a></td><td>\$850.00</td><td>9/19/2023, 8:27</td></tr> <tr><td><a href="#">New Order</a></td><td>\$850.00</td><td>9/19/2023, 8:22</td></tr> <tr><td><a href="#">Pcom_Auto_OrderTi...</a></td><td>\$10,000.00</td><td>9/19/2023, 7:07</td></tr> <tr><td><a href="#">New Order</a></td><td>\$150.00</td><td>9/18/2023, 5:50</td></tr> </tbody> </table> <p><b>Recent Quotes</b></p> <table border="1"> <thead> <tr> <th>Proposal Name</th> <th>Total Am</th> </tr> </thead> <tbody> <tr><td><a href="#">New QuoteDC_Auto_...</a></td><td>\$100.00</td></tr> <tr><td><a href="#">New QuoteDC_Auto_...</a></td><td>\$1,050.00</td></tr> <tr><td><a href="#">New Quote</a></td><td>\$150.00</td></tr> <tr><td><a href="#">New QuoteDC_Auto_...</a></td><td>\$600.00</td></tr> <tr><td><a href="#">New QuoteDC_Auto_...</a></td><td>\$1,050.00</td></tr> </tbody> </table> </div> </div> <p>When you click the Validate Cart button, the revalidation popup appears, from which you can choose and revalidate all of the changes.</p>	Order Name	Order Amount	Created Date	<a href="#">New Order</a>	\$850.00	9/19/2023, 8:31	<a href="#">New Order</a>	\$850.00	9/19/2023, 8:27	<a href="#">New Order</a>	\$850.00	9/19/2023, 8:22	<a href="#">Pcom_Auto_OrderTi...</a>	\$10,000.00	9/19/2023, 7:07	<a href="#">New Order</a>	\$150.00	9/18/2023, 5:50	Proposal Name	Total Am	<a href="#">New QuoteDC_Auto_...</a>	\$100.00	<a href="#">New QuoteDC_Auto_...</a>	\$1,050.00	<a href="#">New Quote</a>	\$150.00	<a href="#">New QuoteDC_Auto_...</a>	\$600.00	<a href="#">New QuoteDC_Auto_...</a>	\$1,050.00
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<a href="#">New QuoteDC_Auto_...</a>	\$1,050.00																																				

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
- Create Order
- Cart Page Fields
- Configuration Page Actions



## 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

**i** The following API with the appropriate parameters retrieves the selected account's cart data. For more information, click [here](#).

**GET** `https://<URL_of_the_Instance>/api/cart/v1/carts`

**For example:** `https://<URL_of_the_Instance>/api/cart/v1/carts?`

`filter=eq(Account.Id:'<actual  
accountId>')&filter=noteq(Status:'Saved')&sort=DESC(ModifiedDate)&Page=<p  
ageNumber>&limit=<pageLimit>`

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

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

**i** The following API is used to create a cart. For more information, click [here](#).


**POST** `https://<URL_of_the_Instance>/api/cart/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](#). You can add up to 10 contract numbers.

- **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/cart/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 carts. For more information, click [here](#).

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

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


 The following API is used to delete carts. For more information, click [here](#).


**DELETE** `https://<URL_of_the_Instance>/api/cart/v1/carts`

- **Clone 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/cart/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/cart/v1/carts`


**For example:** `https://<URL_of_the_Instance>/api/cart/v1/carts?filter=eq(Account.Id:'<actual accountId>')&sort=ASC(Name)&Page=1&limit=10`

Carts (2497) [New Cart](#)

Search Rows per page 10 Showing 1-10 of 2497 results 1 of 250 Pages

1 Selected 

	Name	CreatedDate	Number Of Items	Total Amount
<input checked="" type="checkbox"/>	 0003268e-ff44-4e4...	9/4/2023	0	
<input type="checkbox"/>	 6f8af59d-2716-450...	9/5/2023	2	\$350.00
<input type="checkbox"/>	 454c499d-8d2a-4e2...	9/5/2023	2	\$150.00
<input type="checkbox"/>	 e7742ab4-ac0f-48a...	9/5/2023	1	\$70.00
<input type="checkbox"/>	 9f442027-c2d9-471...	9/5/2023	2	\$360.00

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

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

## New Cart


From the new cart, you can:

- View the complete list of selected products in the cart or from the [mini cart](#)
- Change the cart name by clicking the pencil () icon and editing.
- View the cart's status
- View a cart summary.
- Search for line items using the search bar.
- Clone the cart by clicking the **Clone Cart** button.
- Activate the cart by clicking the **Activate Cart** button.
- Add products to the cart by clicking the **Add Products** button.
- Add recommended products to the cart: If a recommendation rule is set for the product, you can open 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](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](#).
- Add a contract number to apply contract pricing. You can add up to 10 contract numbers.


 • 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 must 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.

- Go to the Product Details page: Click 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 next to the Total Price label to raise a Cart Total popup with default columns. 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.


 To display the required columns when you click the View Details icon, the implementer sets up the flow, configures the column display (list and sequence of fields), and passes the flow name to the storefront `DefaultFlow` field. If you do not specify a flow name, the application uses the default flow (system). The implementor can also set the field as editable while configuring the column display.


For more information on how to create flows and configure columns, see [Configuring the Flows](#) and [Configuring Column Settings](#).



Cart Totals							
Subtotal - Installat...	Subtotal - Standard ...	Subtotal - License F...	Subtotal - Subscript...		Total (Monthly)	Grand Total	
\$1,000.00	\$549.00	\$29.00	\$34.00		\$1,612.00	\$1,612.00	
Totals	Line Type	Charge Type	Frequency	Option Price	Extended Price	Adjustment Type	Adj
Subtotal - Installation Fee (Monthly)	Subtotal	Installation Fee	Monthly	0	1000	None	<input type="checkbox"/>
Subtotal - Standard Price (Monthly)	Subtotal	Standard Price	Monthly	99	549	None	<input type="checkbox"/>
Subtotal - License Fee (Monthly)	Subtotal	License Fee	Monthly	29	29	None	<input type="checkbox"/>
Subtotal - Subscription Fee (Monthly)	Subtotal	Subscription Fee	Monthly	34	34	None	<input type="checkbox"/>
Total (Monthly)	Total	-	Monthly	162	1612	None	<input type="checkbox"/>
<b>Grand Total</b>	<b>Grand Total</b>	-	-	<b>162</b>	<b>1612</b>	None	<input type="checkbox"/>

Update


- View/update configuration details: Click 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, 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 do one or more of the following 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 a 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 the cart-level price summary and total price
- View the detailed cart-level 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".

	Product_502 Product_502	
Quantity 1		\$1,000.00
	OTT Platforms Subscription OTT-01	
Quantity 2		\$2,000.00
Cart Total		\$20,858.00
<a href="#">View Cart</a>		

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 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


After your administrator has created cart views using the CPQ Admin Console or APIs, as an end user, you can select fields of your choice to be displayed on the cart details page. 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.

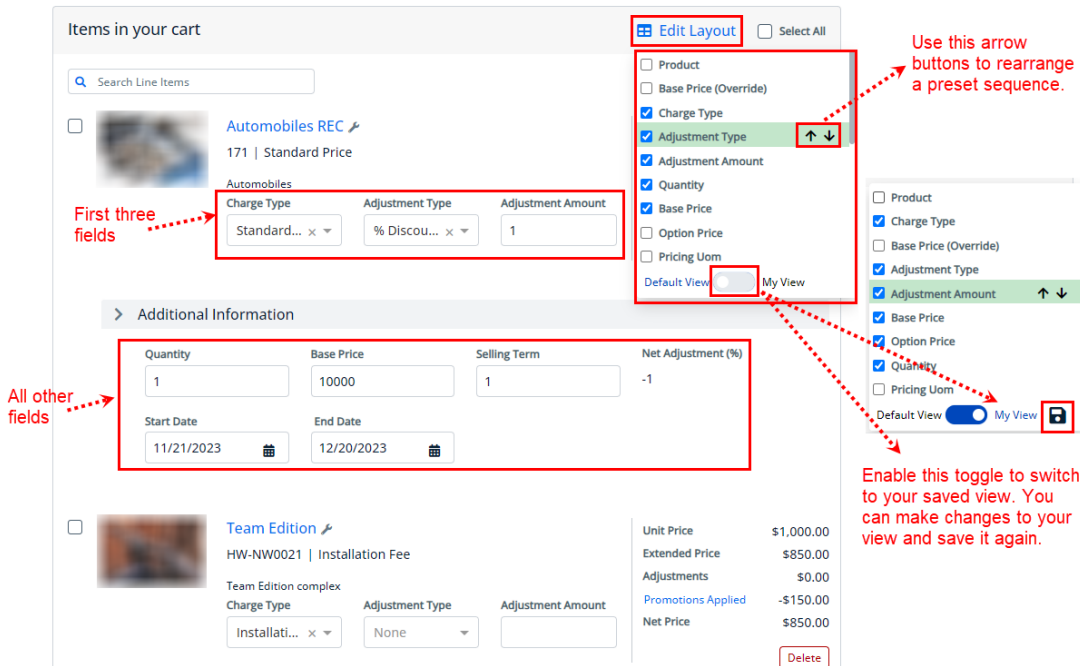
## Prerequisites

- 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 requirements. This eliminates the need for you to start configuring a line item from scratch.

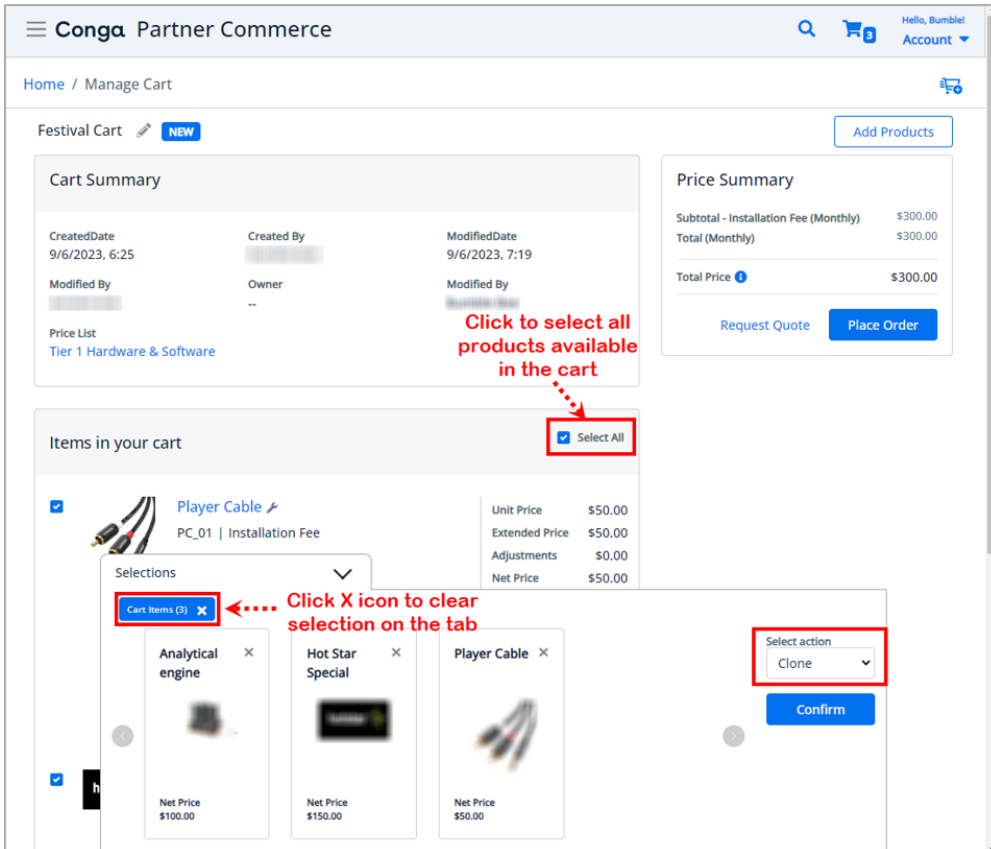
Every line item on the Cart details page has a checkbox beside it. Selecting the checkbox opens a drawer with a list of selected items. From the Select action, select **Clone** and click **Confirm** to add the selected items along with their configurations to the cart.

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.

**i** The following API is used to clone the line items. For more information, click [here](#).

**POST** `https://<URL_of_the_Instance>/api/cart/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.

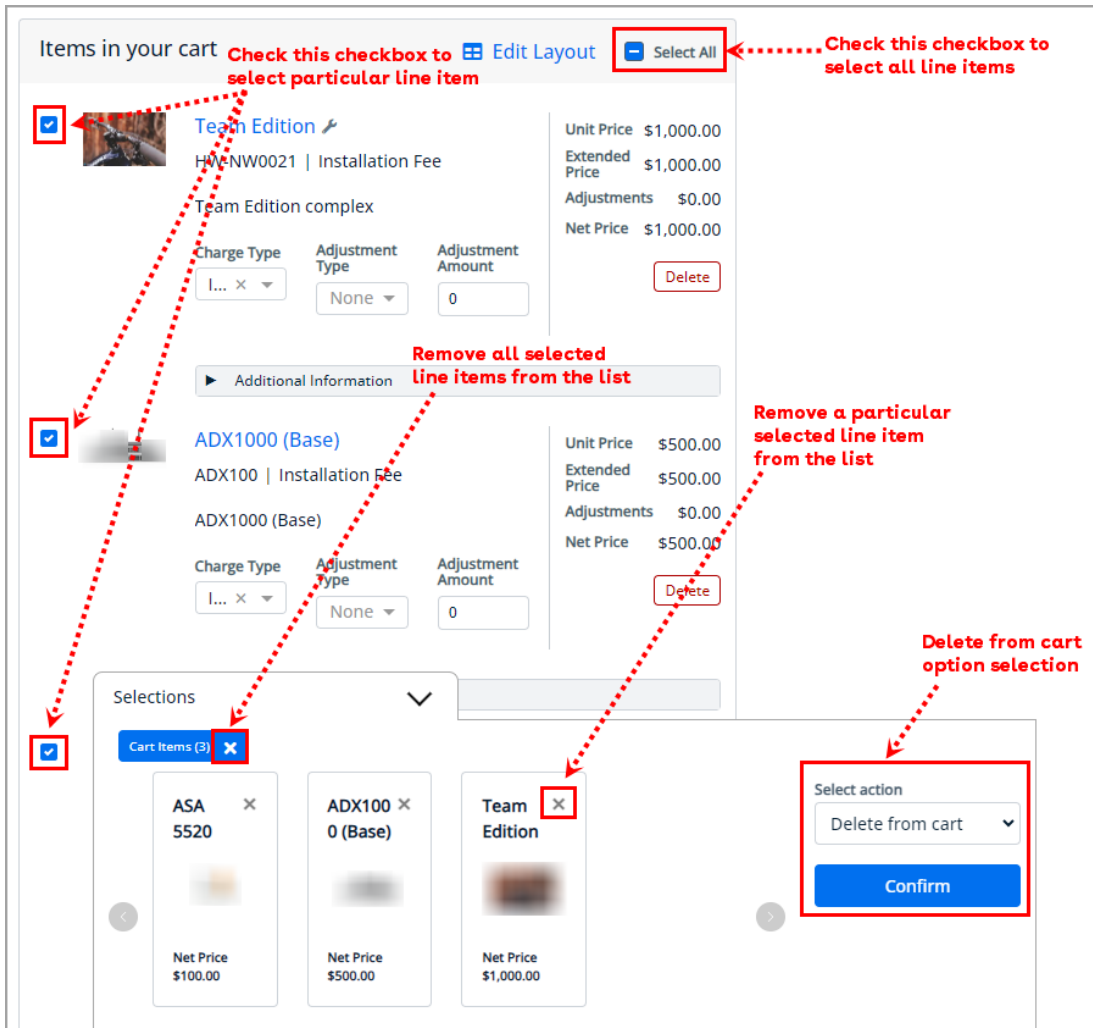


## Deleting Primary Line Items

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.

**i** 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`

**i** 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.



The screenshot displays the 'Promotion Cart' interface. It includes a 'Cart Summary' section with metadata like 'CreatedDate' and 'ModifiedDate'. A 'Price Summary' section shows 'Promotion(s) Applied' as -\$127.50 and a 'Total Price' of \$722.50. The 'Items in your cart' section lists 'Contacts Edition' with various fees. A detailed 'Price Summary' and 'Promotions' panel is shown on the right, highlighting the 'Auto % Markup' promotion and an 'Apply' button.

## 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.

### Price Summary ✕

Promotion(s) Applied	-\$91.38
Subtotal - Standard Price (Monthly)	\$357.00
Subtotal - License Fee (Monthly)	\$178.50
Subtotal - Subscription Fee (Monthly)	\$133.88
Subtotal - Installation Fee (Monthly)	\$89.25
<b>Total (Monthly)</b>	<b>\$758.63</b>

---

**Total Price** ⓘ **\$758.63**

[Request Quote](#) [Place Order](#)

### Promotions

None ▾

[Apply](#)

VA BuyXGetX Simple Incentive 001

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**VA BuyXGetX Simple Incentive-UPD** **\$36.13**

INCENTIVE CODE: Auto % Markup

VA BuyXGetX Simple Incentive 001

[Remove](#)

# 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.

**i** 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.

The screenshot shows a 'Test Cart' interface. On the left, there's a 'Cart Summary' and 'Items in your cart' section. The 'Items in your cart' section lists two items: 'Content Edition' and 'Team B'. For each item, there are fields for 'Unit Price', 'Extended Price', 'Adjustments', 'Promotions Applied', and 'Net Price'. Red circles with the number '2' highlight the 'Promotions Applied' and 'Apply Promotion' links for both items. On the right, a 'Price Summary' shows 'Promotion(s) Applied' as -\$9.63 and 'Total Price' as \$540.38. Below this is a 'Promotions' panel (circled with a red '3') showing a dropdown menu with 'Auto Promotion2'. Below the dropdown is the 'Applied Promotions' section, which lists two promotions: 'VA BuyXGetX Simple Incentive-UPD1' (labeled as 'Automatic Promotion' with a value of -\$7.50) and 'Promotion DC1' (labeled as 'Manual Promotion' with a value of -\$2.13). A 'Total Promotion Amount' of -\$9.63 is shown at the bottom of the promotions panel.

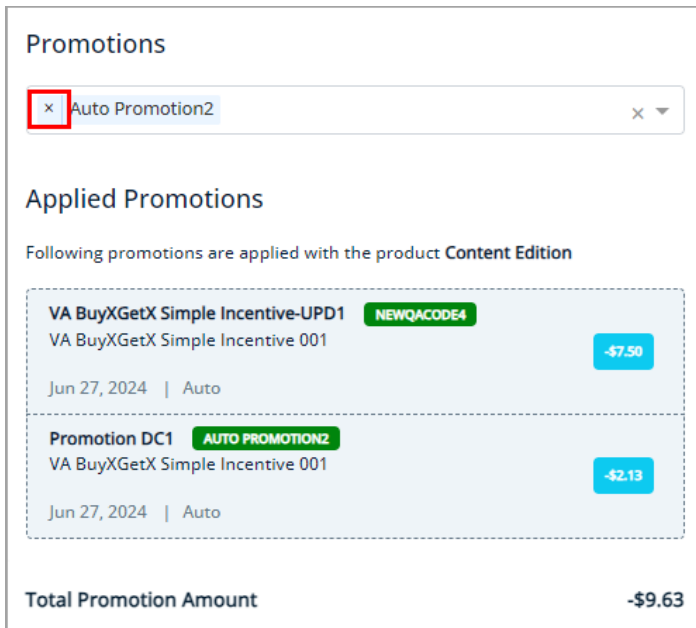
## To view applied promotions

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

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.

You can add favorites to your cart like any other product, making it easy to combine multiple saved configurations in a single order or quote. This feature helps you quickly create accurate quotes and meet different requirements without starting from scratch.

 Favorites can be private or public. A private favorite is only visible to you, while public favorites are visible to everyone on the My Favorites page. You can also view public favorites that are scoped for a specific account.

## Prerequisites

You must set the **EnableFavorite** flag in `ConfigSystemProperties` to use favorites functionality. Enable the flag using the provided API. For more information, click [here](#).

**PUT** `https://<URL_of_the_Instance>/api/revenue-admin/v1/flows/system/settings/ConfigSystemProperties`

Sample Request Body	
1	{
2	"EnableFavorite": <b>true</b>
3	}


This section provides information on managing favorites.

- [Saving Products and Cart Configuration as Favorite](#)
- [Adding New Favorite](#)
- [Updating Existing Favorite](#)
- [Working with Favorites](#)

## 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

The screenshot shows a 'Manage Cart' page for a 'Festival Cart'. The page is divided into several sections:

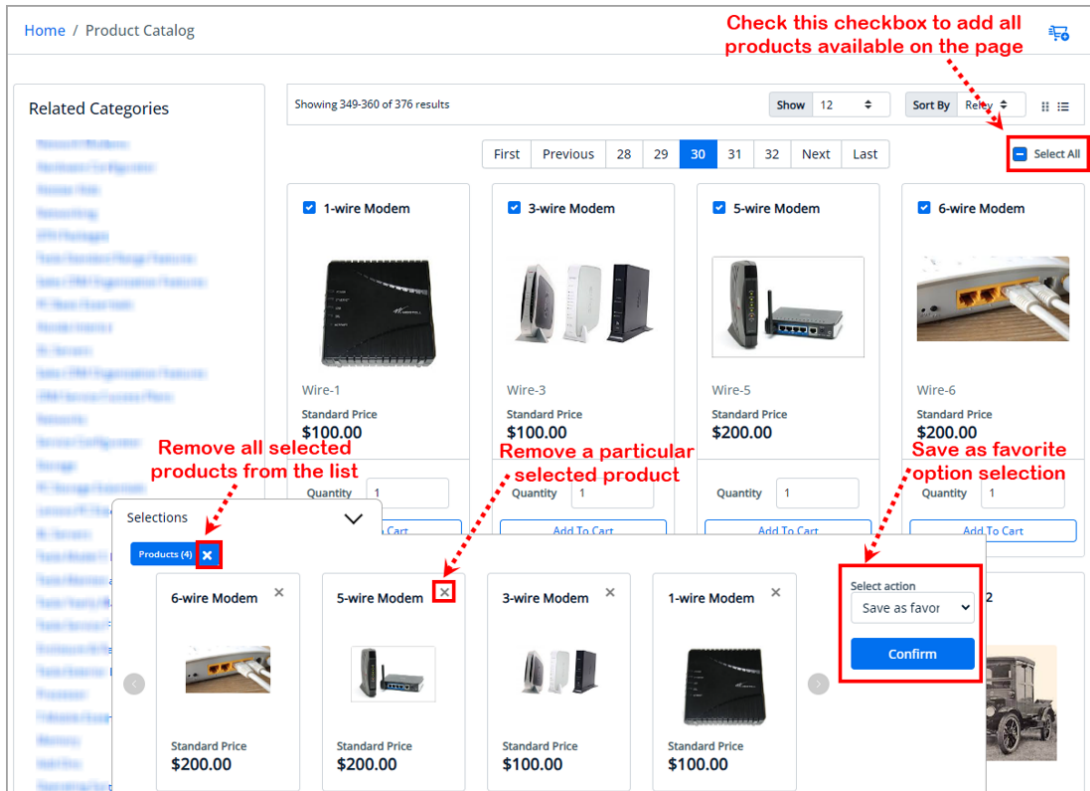
- Cart Summary:** Contains metadata such as 'CreatedDate' (9/6/2023, 6:25), 'Created By', 'ModifiedDate' (9/6/2023, 7:19), 'Modified By', 'Owner', and 'Price List' (Tier 1 Hardware & Software).
- Price Summary:** A table showing 'Subtotal - Installation Fee (Monthly)' and 'Total (Monthly)' both at \$300.00, and a 'Total Price' of \$300.00. It includes 'Request Quote' and 'Place Order' buttons.
- Items in your cart:** A list of items with a 'Select All' checkbox. The first item is 'Player Cable' with a unit price of \$50.00. A price breakdown table is shown below it:

Unit Price	\$50.00
Extended Price	\$50.00
Adjustments	\$0.00
Net Price	\$50.00
- Selections:** A section with a 'Cart Items (3)' button and three item cards: 'Analytical engine' (Net Price \$100.00), 'Hot Star Special' (Net Price \$150.00), and 'Player Cable' (Net Price \$50.00).
- Action Menu:** A dropdown menu with 'Save as favorite' selected and a 'Confirm' button.

Red annotations with arrows point to specific UI elements:

- 'Check this checkbox to add a particular line item' points to a checkbox in the 'Items in your cart' list.
- 'Check this checkbox to add all line items' points to the 'Select All' checkbox.
- 'Remove all selected line items from the list' points to the 'Cart Items (3)' button.
- 'Remove a particular selected line item' points to the 'x' icon on the 'Player Cable' item card.
- 'Save as favorite option selection' points to the 'Save as favorite' option in the dropdown menu.

## Catalog



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.

### Add Favorite

Search or add new favorite

- Fav\_1702326136648
- Fav\_1702326568403
- Fav\_1702408822952
- Fav\_1702325289601
- Fav\_1702326554282
- Fav\_1702408822952

[+ Add New Favorite](#)

2. Specify a name for the new favorite.

### Add Favorite

Name \*

Description

Make publicly visible

[Add To Existing](#) [Add Favorite](#)

3. Provide a brief description.



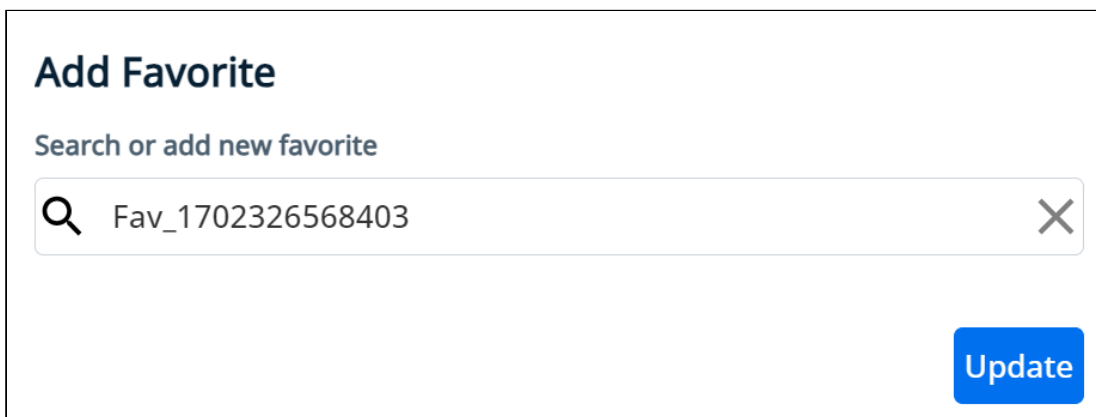
- To make the favorite configuration visible to all the users on the account, select **Make publicly visible**. Do not select this checkbox, if you want to make the favorite configuration visible only to you.
- Click **Add Favorite** to add a new favorite to the favorite list.  
Clicking the **Add To 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:



- Search and select the existing favorite name.
- 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](#).

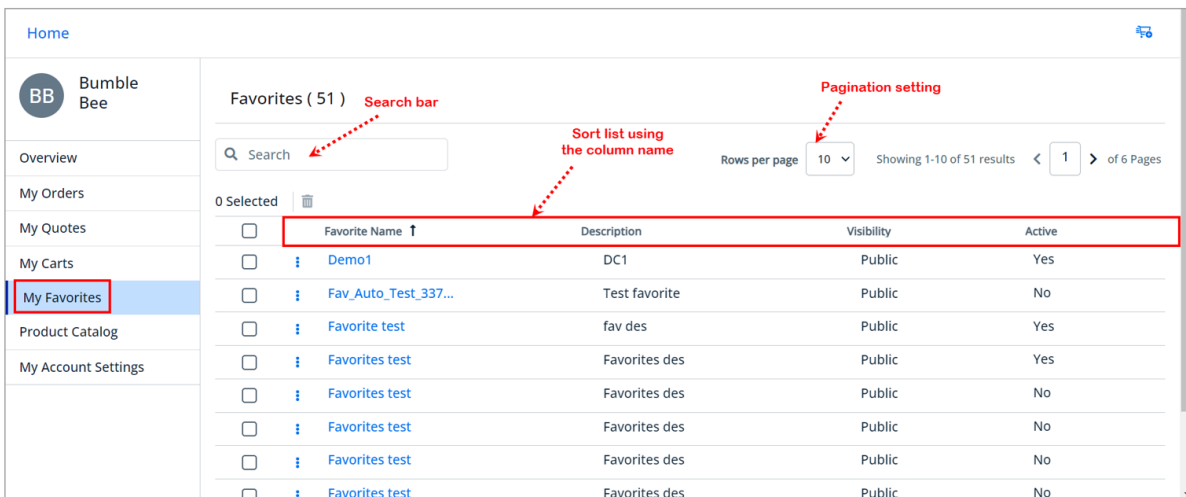
**GET** `https://<URL_of_the_Instance>/api/catalog/v1/favorites`

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

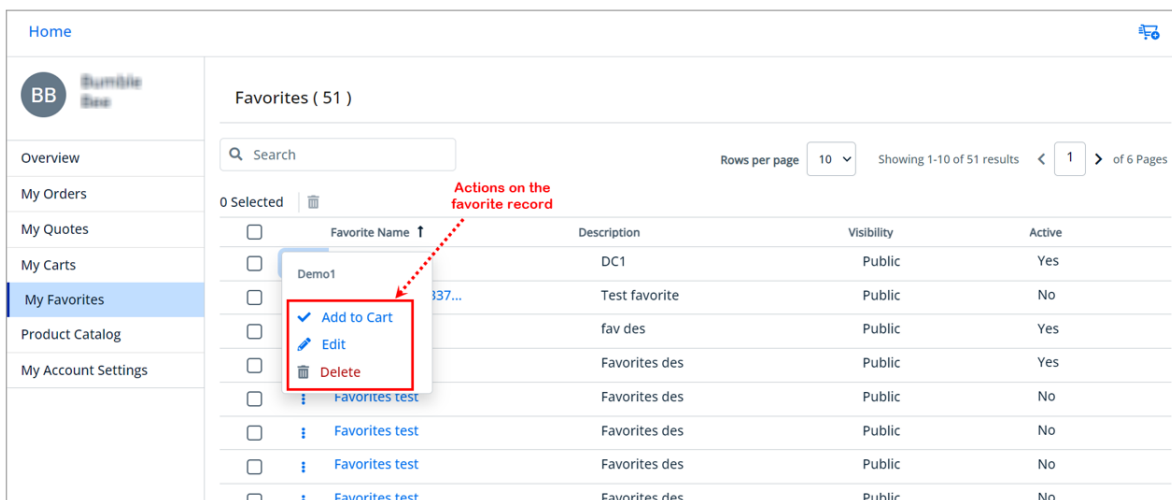
The Favorites home page lists all the favorite configurations (public and private). In the case of private favorite configurations, you can view only those private favorites that you have created as private favorite configurations. To see the details of a particular favorite configuration, click the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

Home / Favorit... / Fav\_1725310891651

Fav\_1725310891651 Add To Cart

[Favorite Summary](#) [Line Items](#)

**Favorite Summary**

Name	Visibility	Created By
Fav_1725310891651	<input type="radio"/> Private <input checked="" type="radio"/> Public	Amar Vuggu
Description	Active	CreatedDate
--	<input type="radio"/> Active <input checked="" type="radio"/> Yes	9/2/2024, 9:01

- 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

My Quotes page displays a list of all quotes that you have requested and created for the selected account. You can also see the total quote number and amount at the top of the My Quotes page. The total quote number and amount will change depending on the filter applied.

**i** 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 **My 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.

**i** 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 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

**i** 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`

T
Total Quotes: 810 | Amount: \$272,394.00

New Quote

#### QUOTES BY STATUS

#### QUOTES BY DUE DATE

Rows per page 10

Showing 1-10 of 810 results < 1 > of 81 Pages

Proposal Name	Approval Stage	RFP Response Due Date	PriceList	Total Amount	Account
New Quote	Draft		Tier 1 Hardware & Software	\$500.00	Test Aut
New QuoteDC_Auto_...	Draft	Dec 10, 2023	Tier 1 Hardware & Software	\$500.00	Test Aut
New QuoteDC_Auto_...	Draft	Dec 10, 2023	Tier 1 Hardware & Software	\$500.00	Test Aut
New QuoteDC_Auto_...	Draft	Dec 10, 2023	Tier 1 Hardware & Software	\$500.00	Test Aut
New QuoteDC_Auto_...	Draft	Dec 10, 2023	Tier 1 Hardware & Software	\$1,200.00	Test Aut
New QuoteDC_Auto_...	Draft	Dec 10, 2023	Tier 1 Hardware & Software	\$1,350.00	Test Aut

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 so you can email the proposal to the customer.

- 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.

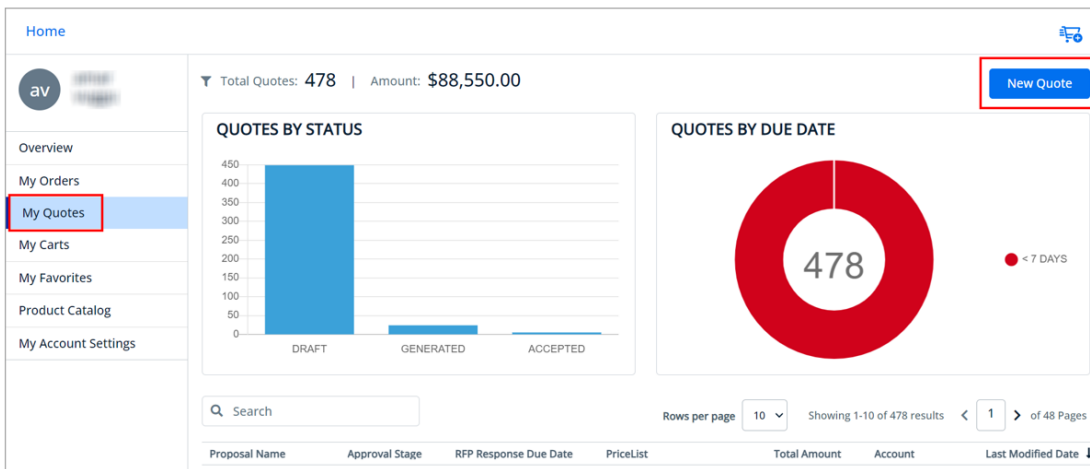
As an experienced buyer, you can also use the **Quick-Add** (🛒) button to add multiple products to the cart and create quotes and orders quickly. For more information, see [Using CTA \(call-to-action\) "Quick-Add" button](#).

## Requesting a Quote

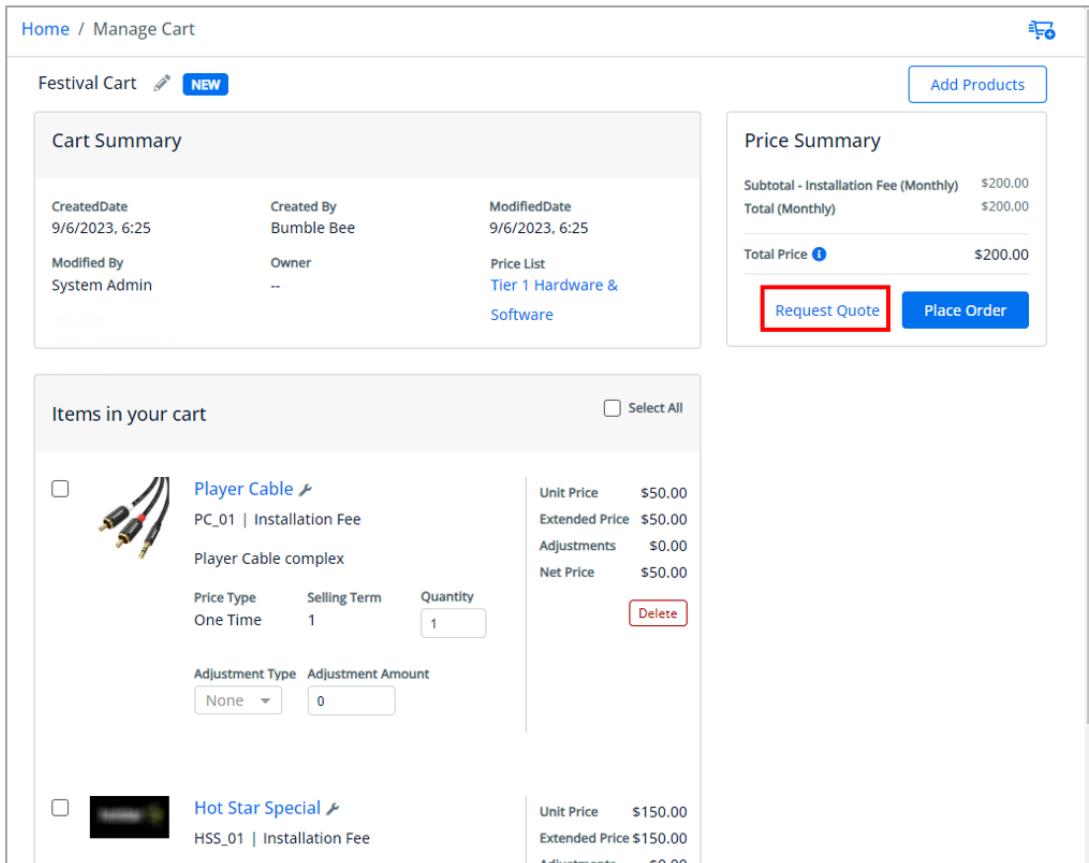
You can request a quote from the following two places:

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 My Quotes (quote list) page and adding line items (products) for the quote.

### My Quotes Page



### Cart Details Page



## To request a quote from the Cart details page

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

### Request Quote

<p><b>Sold To</b> Test Automation1</p> <p><b>Quote Title *</b> Festival Quote</p> <p><b>Ship To</b> Test Automation1</p> <p>170 W Tasman Dr San Jose, California 95134-1700 United States</p> <p><b>Bill To</b> Test Automation1</p> <p>170 West Tasman Drive California, California 95134 United States</p>	<p><b>Price List</b> Tier 1 Hardware &amp; Software</p> <p><b>RFP Response Due Date</b> 2023-09-30T13:35:43</p> <p><b>Primary Contact *</b> Primary Contact_Order_01</p>	<p><b>Price Summary</b></p> <p>Subtotal - Installation Fee (Monthly) \$200.00 Total (Monthly) \$200.00</p> <p>Total Price ⓘ \$200.00</p> <p style="text-align: right;">Cancel <b>Request Quote</b></p>
--	--	--

Field Name	Description
Sold To	Shows the name of the account associated with the primary contact. You cannot edit this field.
Price List	Shows the name of the price list associated with the account selected. You cannot edit this field.
Quote Title	Enter a meaningful Quote Title. By default, it is auto-populated as a New Quote.
RFP Response Due Date	Enter an RFP Response Due Date by which you are expecting a response on the quote request.
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.
Primary Contact	Search and select the Primary Contact associated with your account.
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.

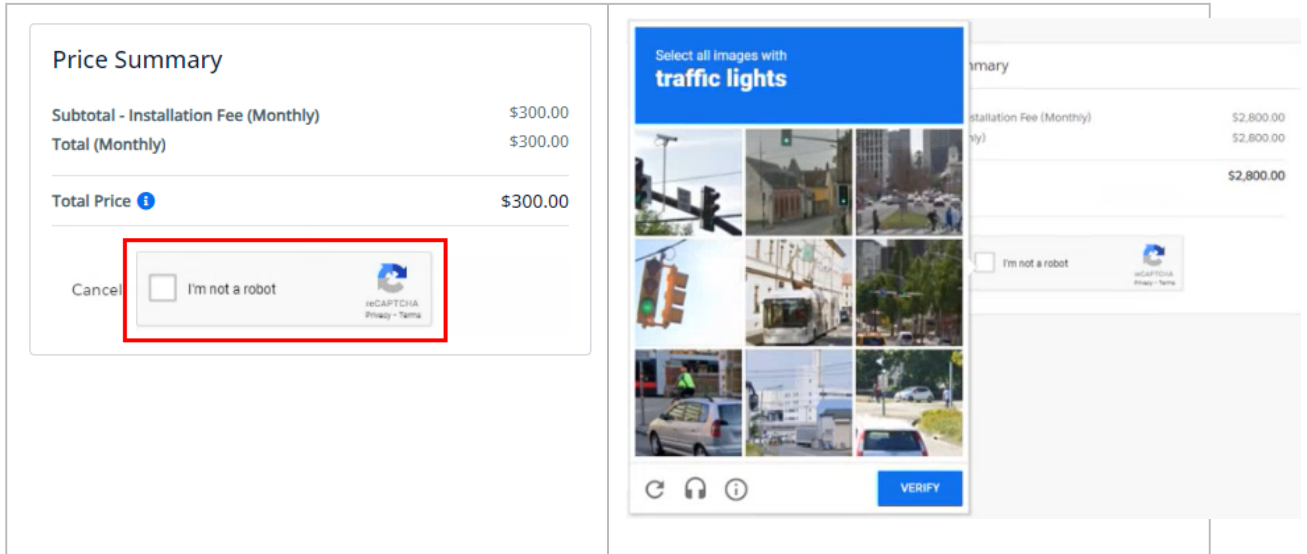
3. Click **Request Quote**. If the implementor has enabled the CAPTCHA functionality, follow the next step.

**i** 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.

**i** 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 My Quotes 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.


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.
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 **Add Products** button or **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 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 and belonging to the same account, go to **My Accounts > My Quotes** page.

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 quote, 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"
}
```

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 quote.

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).

```
1 { ".doc", "application/msword" },
2 { ".docx", "application/vnd.openxmlformats-officedocument.wordprocessingml.document" },
3 { ".rtf", "application/rtf" },
4 { ".pdf", "application/pdf" },
5 { ".xml", "text/xml" },
6 { ".html", "text/html" },
7 { ".txt", "text/plain" },
8 { ".jpg", "application/photoshop" },
9 { ".jpeg", "application/photoshop" },
10 { ".xls", "application/vnd.ms-excel" },
11 { ".xlsx", "application/vnd.ms-excel" },
12 { ".ppt", "application/vnd.ms-powerpoint" },
13 { ".pptx", "application/vnd.ms-powerpoint" },
14 { ".json", "application/json" },
15 { ".zip", "application/zip" },
16 { ".png", "image/png" }
```

**i** 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 partner sales rep, you can generate a quote document so that you can email the proposal document to the customer for their review and acceptance. The Generate Quote button is available for a quote in Draft or Approved status.

### To generate a quote document

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

**i** 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.

**i** 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.

**i** 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 Partner Commerce. **My Orders** page lists all the orders that you are working with for the selected account. You can also see the total order number and amount at the top of the My Orders page. The total order number and amount will change depending on the filter applied.

**i** 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 **My 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 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.

**i** 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`

Total Orders: 1621 | Amount: \$9,295,096.10

### ORDERS BY STATUS

### ORDER AMOUNT BY STATUS

Rows per page 10

Showing 1-10 of 1621 results
<
1
>
of 163 Pages

Order Name	Status	PriceList	Bill To	Ship To	Order Amount	Created
<a href="#">New Order</a>	Generated	Tier 1 Hardware & Software	Test Automation1	Test Automation1	\$722.50	11/2
<a href="#">Order-QuoteTest</a>	Draft	Tier 1 Hardware & Software	Test Automation1	Test Automation1	\$18,565.00	11/2
<a href="#">New Order</a>	Generated	Tier 1 Hardware & Software	Test Automation1	Test Automation1	\$500.00	11/2
<a href="#">New Order</a>	Draft	Tier 1 Hardware & Software	Test Automation1	Test Automation1	\$100.00	11/2
<a href="#">New Order</a>	Draft	Tier 1 Hardware & Software	Test Automation1	Test Automation1	\$100.00	11/2
<a href="#">New Order</a>	Draft	Tier 1 Hardware & Software	Test Automation1	Test Automation1	\$722.50	11/2

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](#).

## Creating an Order

As a Partner Sales Representative or Order Desk User, you can create an order on behalf of a customer to help them in ordering products or services. you can add products to the cart and create an order quote by clicking the **Place Order** button on the cart page. The Create Order page appears.

Home / Manage Cart 🛒

Festival Cart NEW Add Products

### Cart Summary

CreatedDate 9/6/2023, 6:25	Created By Bumble Bee	ModifiedDate 9/6/2023, 6:25
Modified By System Admin	Owner --	Price List Tier 1 Hardware & Software

### Price Summary

Subtotal - Installation Fee (Monthly)	\$200.00
Total (Monthly)	\$200.00
<hr/>	
Total Price <span style="color: blue;">i</span>	\$200.00

Request Quote
Place Order

### Items in your cart ☐ Select All

☐	<b>Player Cable</b> <span style="color: blue;">✎</span> PC_01   Installation Fee Player Cable complex	Unit Price \$50.00 Extended Price \$50.00 Adjustments \$0.00 Net Price \$50.00	<input type="text" value="1"/> <span style="border: 1px solid red; padding: 2px 5px; color: red; font-weight: bold;">Delete</span>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td>Price Type</td> <td>Selling Term</td> <td>Quantity</td> </tr> <tr> <td>One Time</td> <td>1</td> <td><input type="text" value="1"/></td> </tr> </table> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td>Adjustment Type</td> <td>Adjustment Amount</td> </tr> <tr> <td>None <span style="color: blue;">▼</span></td> <td><input type="text" value="0"/></td> </tr> </table>	Price Type	Selling Term	Quantity	One Time	1	<input type="text" value="1"/>	Adjustment Type	Adjustment Amount	None <span style="color: blue;">▼</span>	<input type="text" value="0"/>
Price Type	Selling Term	Quantity												
One Time	1	<input type="text" value="1"/>												
Adjustment Type	Adjustment Amount													
None <span style="color: blue;">▼</span>	<input type="text" value="0"/>													
☐	<b>Hot Star Special</b> <span style="color: blue;">✎</span> HSS_01   Installation Fee	Unit Price \$150.00 Extended Price \$150.00 Adjustments \$0.00												

## To create an order

1. Enter the following details for the order on the Create Order page; however, some of the fields have default values.

### Create Order

<b>Sold To</b> <a href="#">Test Automation1</a>	<b>Price List</b> <a href="#">Tier 1 Hardware &amp; Software</a>
<b>Order Title *</b> <input type="text" value="New Order"/>	<b>Primary Contact *</b> <input type="text" value="Primary Contact_Order_01"/>
<b>Bill To *</b> <input type="text" value="Test Automation1"/>	<b>Ship To *</b> <input type="text" value="Test Automation1"/>
170 West Tasman Drive California, California 95134 United States	170 W Tasman Dr San Jose, California 95134-1700 United States

### Price Summary

Subtotal - Installation Fee (Mon...	\$200.00
Total (Monthly)	\$200.00
<hr/>	
Total Price <span style="color: blue;">i</span>	\$200.00

Cancel
Place Order


### Your cart

2-wire Modem	\$200.00
Product ID: WM_02   Quantity:	\$200.00
1   <a href="#">Details</a>	



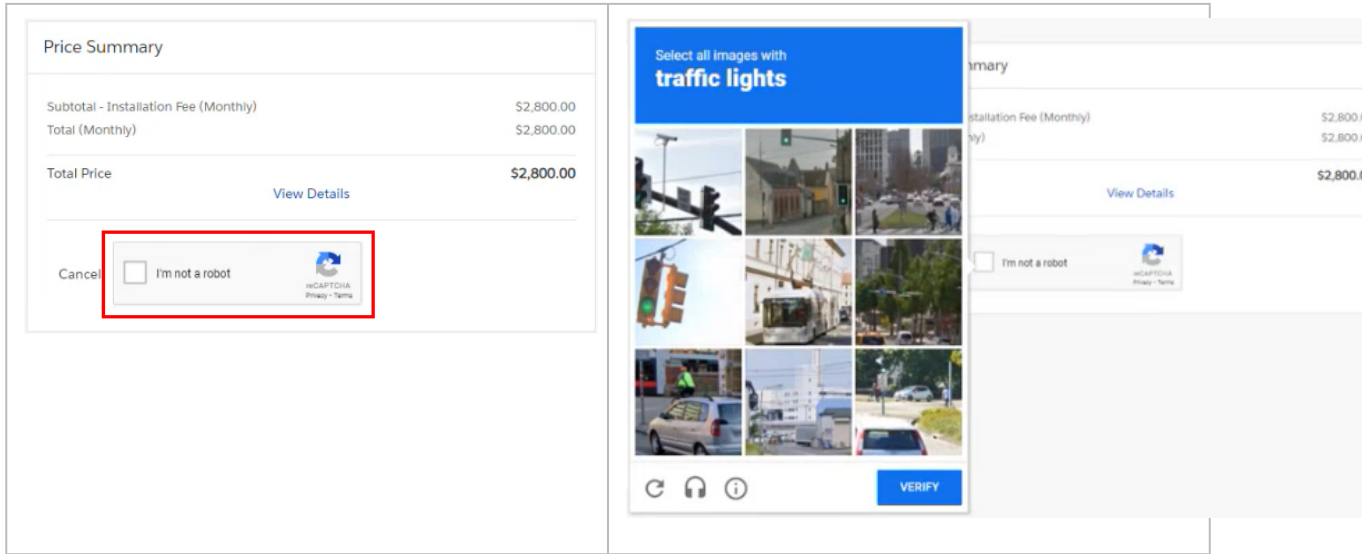
Field Name	Description
Sold To	Shows the name of the account associated with the primary contact. You cannot edit this field.
Price List	Shows the name of the price list associated with the account selected. You cannot edit this field.
Order Name	Enter the name of the order. By default, it is auto-populated as New Order.
Primary Contact	Search and select the Primary Contact associated with your account.
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.

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 **VIEW YOUR ORDER**. This opens the Order details page.

**i** 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 Created Order

After creating an order, you can view and modify some of the fields. To view all the orders created by you and belonging to the same account, go to **My Accounts > My Orders** page.

Click the Order Name link from the Order list page or click the **REVIEW YOUR ORDER** button from the *Create Order* 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"
}
```

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. 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).

```


1 { ".doc", "application/msword" },
2 { ".docx", "application/vnd.openxmlformats-officedocument.wordprocessingml.document" },
3 { ".rtf", "application/rtf" },
4 { ".pdf", "application/pdf" },
5 { ".xml", "text/xml" },
6 { ".html", "text/html" },
7 { ".txt", "text/plain" },
8 { ".jpg", "application/photoshop" },
9 { ".jpeg", "application/photoshop" },
10 { ".xls", "application/vnd.ms-excel" },
11 { ".xlsx", "application/vnd.ms-excel" },
12 { ".ppt", "application/vnd.ms-powerpoint" },
13 { ".pptx", "application/vnd.ms-powerpoint" },
14 { ".json", "application/json" },
15 { ".zip", "application/zip" },
16 { ".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.

## Generating an Order

As a partner, when you place an order on behalf of a customer, you must generate the order document before confirming the order. You can generate an order that is in Draft status.

### To generate an order document

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

**i** The list of templates is retrieved from the Template object, where the business object is Order 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/objects/Template?criteria=BusinessObject=Order`

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 order document generation. A confirmation message appears and the order details page is displayed.

**i** 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 order stage moves from Draft to Generated, the generated order document is available under the Attachments section, and a notification email is sent to the associated partner and customer. You can also download and delete the generated document.

**i** 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`

## Confirming an Order

As a partner, when a customer places an order or you place an order on behalf of a customer, you must confirm it to sync it with the cart and create the order line items. You can confirm an order that is in Draft or Generated status.

### To confirm an order

1. From the order details page, click **Confirm Order**.

**i** The following API is used for confirming the order. For more information, click [here](#).

**POST** `https://<URL_of_the_Instance>/api/order/v1/orders/{orderId}/confirm`

When an order is confirmed it is automatically generated and presented and the order status changes from **Draft** to **Confirmed**. After confirmation is complete, the user also receives an email notification.

## 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.

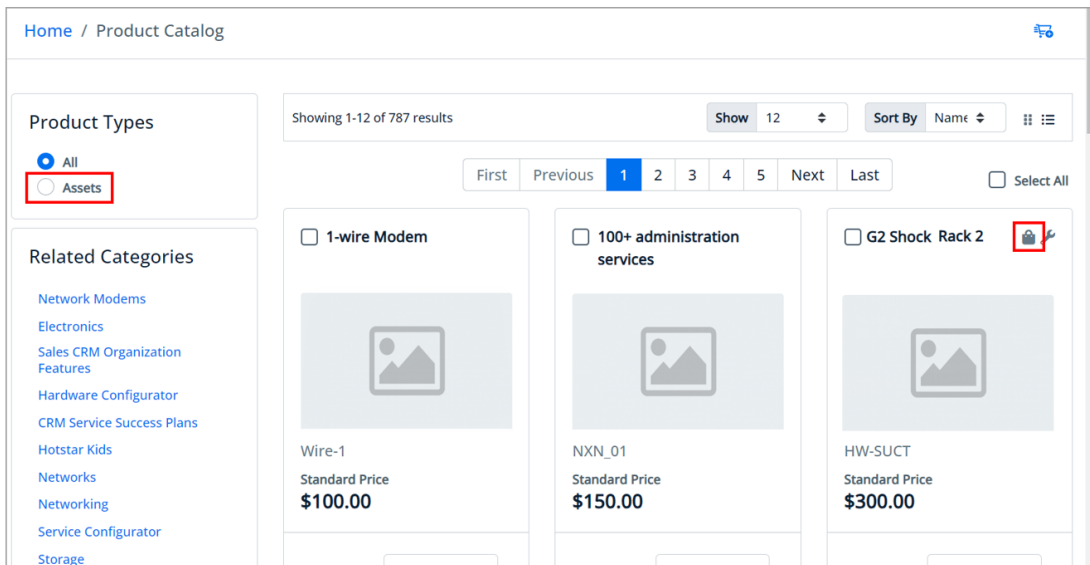
### Prerequisites for Asset Actions

- 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:

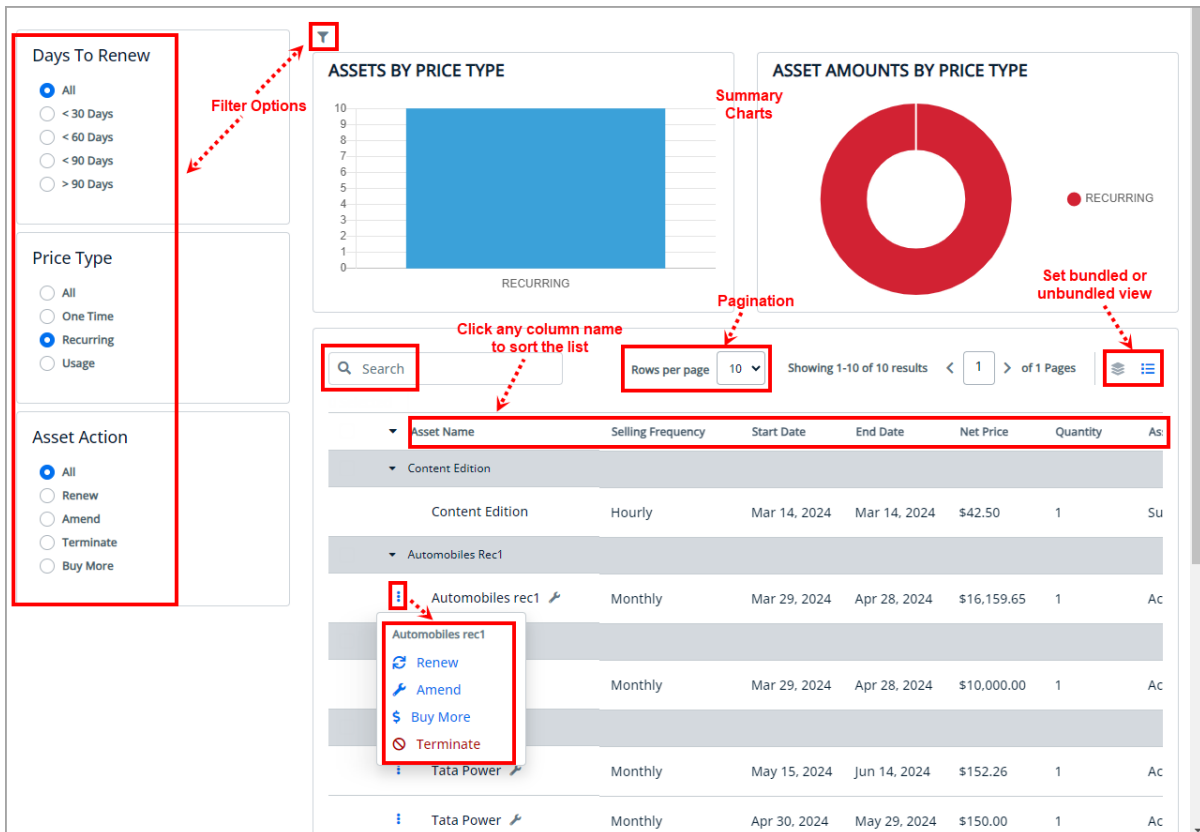
- Asset Name
- Selling Frequency
- Start Date
- End Date
- Net Price
- Quantity
- Asset Status
- Price Type

ⓘ 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
- Buy More
- Amend
- Terminate

⚠️ • 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 > assetActionLabels](#) 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.

- i** 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.

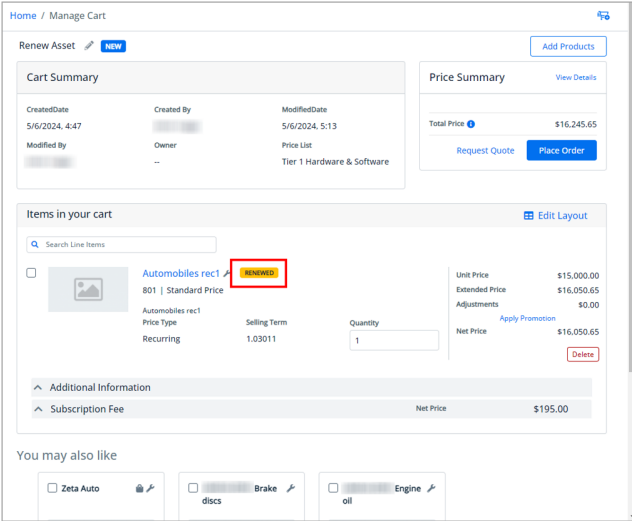
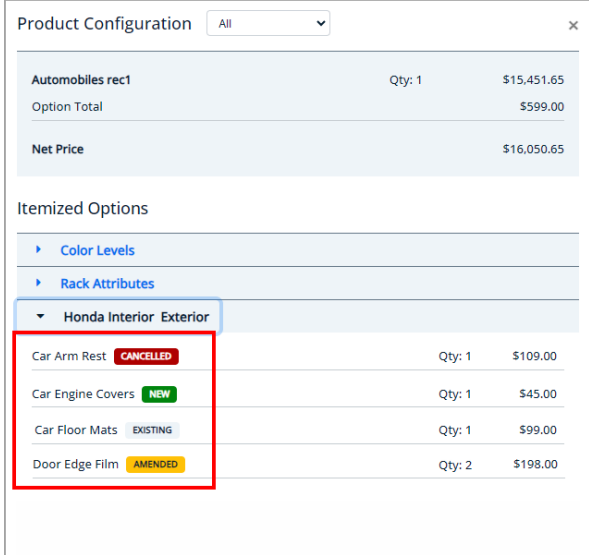
## To renew an asset

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.

Asset Product Status on the Cart, Quote, and Order details page	Line Status (bundle, option, and option group)
 <p>The screenshot shows the 'Manage Cart' interface. Under 'Items in your cart', the item 'Automobiles rec1' is listed with a 'NEW' status label highlighted in a red box. The 'Price Summary' shows a total price of \$16,245.65. Below the cart items, there are sections for 'Additional Information' and 'Subscription Fee'.</p>	 <p>The screenshot shows the 'Product Configuration' dialog. Under 'Itemized Options', the 'Honda Interior Exterior' group is expanded. A red box highlights four options: 'Car Arm Rest' with status 'CANCELLED', 'Car Engine Covers' with status 'NEW', 'Car Floor Mats' with status 'EXISTING', and 'Door Edge Film' with status 'AMENDED'. Each option includes its quantity and price.</p>

## 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.

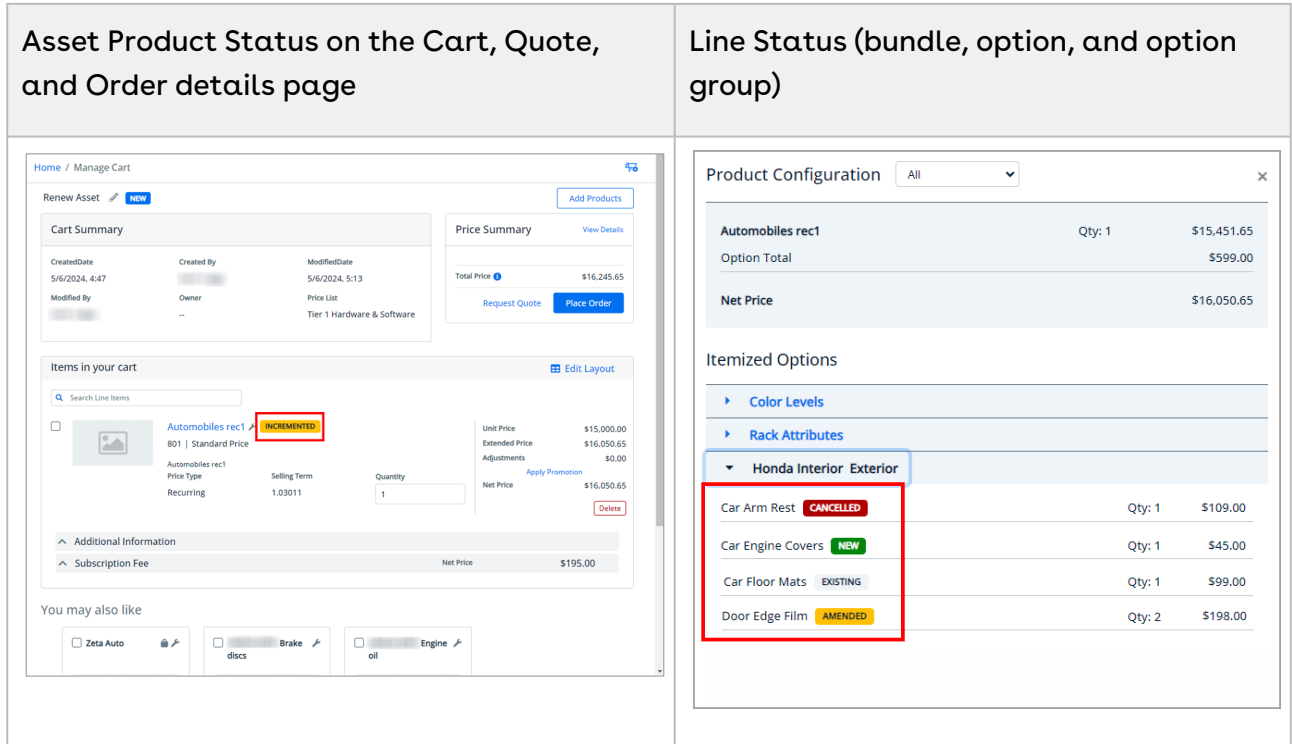
**i** The Buy More action will be disabled If the asset's status isn't activated or if it's already in the cart for another action based on assets. To ensure the line status is incremented, set the EnableOneTimeChange flag to True in asset settings.

## 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.



## 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.

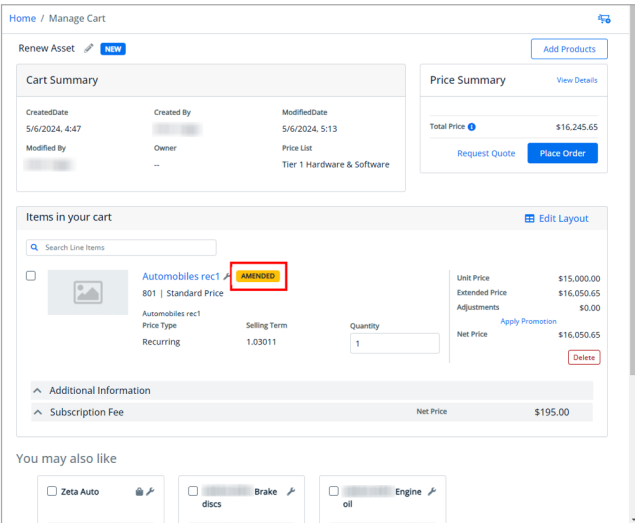
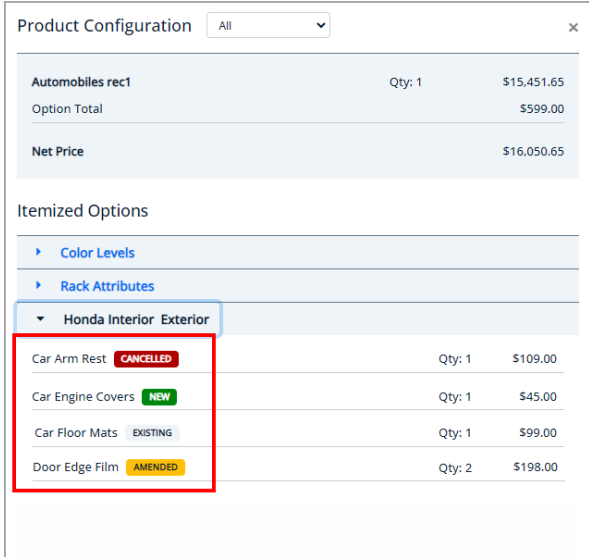
## To amend an asset

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.

Asset Product Status on the Cart, Quote, and Order details page	Line Status (bundle, option, and option group)
 <p>The screenshot shows the 'Manage Cart' interface. Under 'Items in your cart', the 'Automobiles rec1' line item is highlighted with a red box around the 'AMENDED' status label. The 'Price Summary' shows a total price of \$16,245.65. Below the cart items, there are suggestions for 'Zeta Auto', 'Brake discs', and 'Engine oil'.</p>	 <p>The screenshot shows the 'Product Configuration' page. Under 'Itemized Options', the 'Honda Interior Exterior' group is expanded. A red box highlights four options: 'Car Arm Rest' (CANCELLED), 'Car Engine Covers' (NEW), 'Car Floor Mats' (EXISTING), and 'Door Edge Film' (AMENDED). Each option is listed with its quantity and price.</p>

## 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.

**i** 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.


**i** 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.

**Add to Cart**

#	Product	Quantity	Adjustment Type	Adjustment Amount	
1	<input type="text" value="0...10 V Analog"/>	<input type="text" value="1"/>	% Discount <span>×</span> <span>▼</span>	<input type="text" value="20"/>	<span>✕</span>
2	<input type="text" value="Enter the prod"/>	<input type="text" value="1"/>	None <span>▼</span>	<input type="text"/>	<span>✕</span>


+ [Add Product](#)

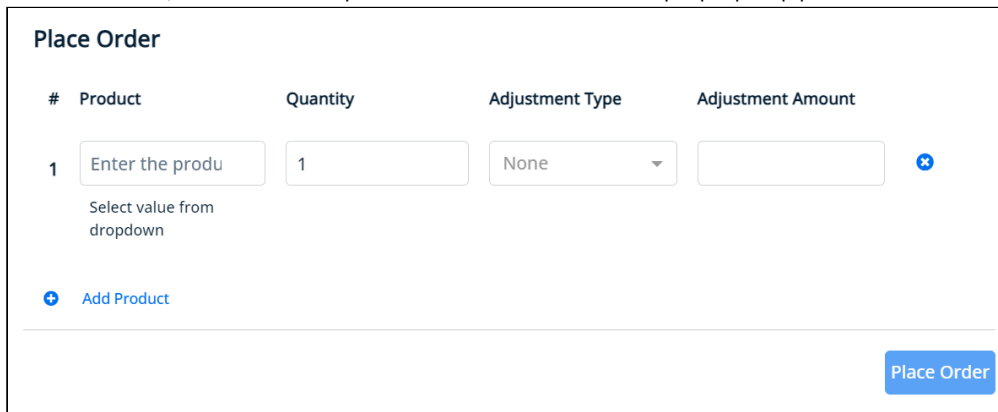
[Add To Cart](#)

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.




The screenshot shows a 'Place Order' popup window. It contains a table with the following columns: '#', 'Product', 'Quantity', 'Adjustment Type', and 'Adjustment Amount'. The first row has the value '1' in the '#' column, 'Enter the produ' in the 'Product' column, '1' in the 'Quantity' column, 'None' in the 'Adjustment Type' column, and an empty field in the 'Adjustment Amount' column. Below the table, there is a blue '+ Add Product' link and a blue 'Place Order' button.

#	Product	Quantity	Adjustment Type	Adjustment Amount
1	Enter the produ <small>Select value from dropdown</small>	1	None	

[+ Add Product](#)

**Place Order**

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.

### Place Order

<p><b>Name *</b></p> <input style="width: 90%;" type="text" value="New Order"/>	<p><b>Primary Contact *</b></p> <input style="width: 90%;" type="text" value="Q"/>
<p><b>Description</b></p> <input style="width: 90%;" type="text"/>	<p><b>Bill To</b></p> <input style="width: 90%;" type="text" value="Q"/>
<p><b>Price List</b></p> <p>Tier 1 Hardware &amp; Software</p>	<p><b>Source Channel</b></p> <input style="width: 90%;" type="text" value="None"/>

Cancel
Place 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.

### Place Quote

#	Product	Quantity	Adjustment Type	Adjustment Amount
1	<input style="width: 90%;" type="text" value="Enter the produ"/> <small>Select value from dropdown</small>	<input style="width: 90%;" type="text" value="1"/>	None ▾	<input style="width: 90%;" type="text"/>
<span style="color: #007bff; font-weight: bold;">+ Add Product</span>				

Place Quote

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.

### Place Quote

Name *	Primary Contact *
<input type="text" value="New Quote"/>	<input type="text" value=""/>
Description	Bill To
<input type="text" value=""/>	<input type="text" value=""/>
Amount	ABO Type
<input type="text" value=""/>	<input type="text" value="None"/>
Discount %	Price List
<input type="text" value=""/>	<input type="text" value="Tier 1 Hardware &amp; Software"/>

[Cancel](#) [Request 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.

# Partner Commerce SDK

This section describes API and UI component references used to build a Partner 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 <a href="#">What's New in Partner Commerce Documentation</a> .
Other Resources	<ul style="list-style-type: none"> <li>• See <a href="#">Partner Commerce for Administrators</a> for implementation and deployment procedures.</li> <li>• See <a href="#">Partner Commerce for Users</a> for basic admin tasks and end-user experience.</li> <li>• See <a href="#">Partner Commerce for REST API Developers</a> for details of the CPQ REST APIs consumed by Partner Commerce.</li> <li>• See <a href="#">CPQ documentation</a> for detailed information on setting up the master data.</li> </ul>

Refer to the following topic for more information on SDK:

- [SDK Reference](#)

# SDK Reference



# Partner 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 walks API developers through the list of REST APIs provided by Conga.
Primary Audience	API developers
Updates	For a comprehensive list of updates for each release, see <a href="#">What's New in Partner Commerce Documentation</a> .
Other Resources	<ul style="list-style-type: none"> <li>• See <a href="#">Partner Commerce for Administrators</a> for implementation and deployment procedures.</li> <li>• See <a href="#">Partner Commerce for Users</a> for basic admin tasks and end-user experience.</li> <li>• See <a href="#">Partner Commerce SDK</a> for technical instructions on the installation and setup of a Partner Commerce storefront.</li> </ul>

For more information, see

- [Partner Commerce API Reference](#)

# Partner 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](#).

# Partner Commerce Features by Release

Review the latest Partner Commerce Features by Release document.

- [Features by Release](#)

## Features by Release

This document contains an overview of features introduced in each major release of Partner Commerce on Conga Platform. For more information, see [Partner Commerce on Conga Platform Features by Release](#).



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